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Consular reports

United States. Bureau of Foreign Commerce, United
States. Dept. of Commerce and Labor

Econ 5810.2

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VI. 990

Vol. XLIV. Ital. No. 160.

CONSULAR REPORTS.

JANUARY, 1894.

COMMERCE, MANUFACTURES, ETC.

(PACKING GOODS FOR EXPORT.)

DEPARTMENT OF STATE * UNITED STATES OF AMERICA *

WASHINGTON:
GOVERNMENT PRINTING OFFICE.
1894.

PUBLICATIONS OF THE BUREAU OF STATISTICS.

In addition to the monthly CONSULAR REPORTS, the following works have been published by the Bureau of Statistics:

"Labor in Europe," 1878, one volume; "Labor in Foreign Countries," 1884, three volumes; "Commerce of the World and the Share of the United States Therein," 1879; "Commerce of the World and the Share of the United States Therein," 1880–'81; "Declared Exports for the United States, First and Second Quarters, 1883;" "Declared Exports for the United States, Third and Fourth Quarters, 1883." "Cholera in Europe in 1884," 1885; "Trade Guilds of Europe," 1885; "The Licorice Plant," 1885; "Forestry in Europe," 1887; "Emigration and Immigration," 1885–'86 (a portion of this work was published as CONSULAR REPORTS No. 76, for the month of April, 1887); "Rice Pounding in Europe," 1887; "Sugar of Milk," 1887; "Wool Scouring in Belgium," 1887. "Cattle and Dairy Farming in Foreign Countries," 1888 (issued first in one volume, afterwards in two volumes); "Technical Education in Europe," 1888; "Tariffs of Central America and the British West Indies," 1890.

The editions of all these publications except the one last mentioned are exhausted.

Information relating to special subjects—secured by circulars addressed to consular officers—increased to such an extent that at length in 1890 the Department decided to publish such reports in separate form to be entitled "Special Consular Reports." There are now nine volumes of these "Special Consular Reports:"

Vol. 1 (1890).—"Cotton Textiles in Foreign Countries," "Files in Spanish America," "Carpet Manufacture in Foreign Countries," "Malt and Beer in Spanish America," and "Fruit Culture in Foreign Countries."

Vol. 2 (1891).—"Refrigerators and Food Preservation in Foreign Countries," "European Emigration," "Olive Culture in the Alpes Maritimes," and "Beet Sugar Industry and Flax Cultivation in Foreign Countries."

Vol. 3 (1891).—"Streets and Highways in Foreign Countries."

Vol. 4 (1892).—"Port Regulations in Foreign Countries."

Vol. 5 (1892).—"Canals and Irrigation in Foreign Countries."

Vol. 6 (1892).—"Coal and Coal Consumption in Spanish America," "Gas in Foreign Countries," and "India Rubber."

Vol. 7 (1892).—"The Stave Trade in Foreign Countries," and "Tariffs of Foreign Countries."

Vol. 8 (1892).—"Fire and Building Regulations in Foreign Countries."

Vol. 9 (1892 and 1893).—"Australian Sheep and Wool," and "Vagrancy and Public Charities in Foreign Countries."

Of these Special Reports "Cotton Textiles in Foreign Countries," "Files in Spanish America," and "Malt and Beer in Spanish America" are exhausted.

CONSULAR REPORTS.

COMMERCE, MANUFACTURES, ETC.

VOL. XLIV.

Nos. 160, 161, 162, and 163.

JANUARY, FEBRUARY, MARCH, AND APRIL, 1894.

WASHINGTON:
GOVERNMENT PRINTING OFFICE.
1894.

~~W. 990~~
Econ 5810.2

1874, Feb. 19 – Mar. 17.
Gift –
From Dep't of State.

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Cape Town, by Consul C. H. Benedict.
Newcastle, New South Wales, by Vice-Commercial Agent Stewart Keightley.
Rio de Janeiro, by Consul William T. Townes.

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CONSULAR REPORTS.

PACKING GOODS FOR EXPORT.

Vol. XLIV. JANUARY, 1894. No. 160.

INTRODUCTORY NOTE.

The reports of our consular officers for the past ten years have been filled with complaints of the manner in which goods exported from this country are packed.* These criticisms, though in the main ignored, have nevertheless accomplished some good. As there was reason to think that plain, practical directions to our exporters concerning the manner in which all classes of goods should be shipped to various parts of the world would be heeded, the Department, on July 7, 1893, sent to all the consular officers of the United States the following circular:

> You are hereby requested to prepare reports concerning the proper method of packing American goods for export to meet the requirements of your several districts, and transmit the same to the Department at your earliest convenience.
>
> In your reports you will deal with the several classes of goods under separate heads—(1) dry goods, (2) groceries, (3) liquids, (4) iron manufactures, (5) hardware, etc.
>
> You will consult leading merchants and shippers, and give their views on the most suitable manner of packing to meet local, as well as transit, requirements.
>
> The following interrogatories cover the principal points upon which information is desired:
>
> (1) How do goods reach your district from the United States, and what are the handlings and usage to which they are subjected en route?
>
> (2) How are goods landed from the vessel at your port—at wharves or by lighters?
>
> (3) Are warehouses provided, or are the goods liable to be exposed to the elements?
>
> (4) How are goods shipped to the interior, and to what handlings and usage are they subjected en route? (If by pack horses or porters, give the size—length, breadth, and height—and weight of packages suitable to meet requirements.)

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*See, for example, the following reports:
Packing goods for tropical countries, Vol. 7, No. 23, p. 333.
Packing of textile fabrics, Vol. 7, No. 23, p. 53.
Packing and shipment of articles for South America, Vol. 18, No. 62, p. 593.
Careless packing of American kerosene, Vol. 42, No. 153, p. 222.
Packing goods for Guatemala, Vol. 42, No. 152, p. 61.

(5) What is the best material for outside covering? Should the package be a bale, box, keg, barrel, sack, or bag? Should the package be waterproof?

(6) Are customs duties charged on the box, keg, etc., and to what extent does such imposition of duties affect the cost of goods to the importers? Describe the best package, consistent with safety, to reduce such tariff cost to a minimum.

It is expected by the Department that the replies to this circular will cover every point of interest involved, so that, when published, the American manufacturers and exporters will have a manual which will enable them to meet the packing requirements of every country. You will therefore spare no pains to make your reports complete, even to minute details. Illustrations calculated to help the packer to a clearer understanding of the subject—if such illustrations can be easily secured—should accompany your reports.

It is hoped that these replies, now printed and supplemented with an index, both topical and geographical, will serve as a useful manual of packing and shipping directions for the guidance of our merchants and manufacturers.

A good general rule of packing is to follow implicitly the directions of purchasers, and it is a rule which those observe who have been for a considerable period engaged in foreign trade. It is true, as one of the contributors to this manual declares, that good packing and the proper consignment of goods result from a dependence upon export trade.

The Germans, who are constantly endeavoring to enlarge the markets for their manufactures, consider that there is no more important factor in trade than a strict compliance with the demands of customers relative to packing.

As our export trade increases, there will be in many foreign ports special agents of American houses, as at present there are in Hamburg and Bremen, who will "first notice the defects and promptly report them" (see report from Frankfort). But in the meantime our merchants may learn from publications of this character how absolutely necessary it is to comply with the instructions of foreign customers as regards the size, weight, and form of packages, however unreasonable they may appear to be.

Many errors may be avoided by those engaged in foreign trade, and especially by those who are about to embark in it, if careful attention be paid to the suggestions now offered in these reports. Our consular officers have not contented themselves with a mere description of the proper covering for various classes of goods, but have volunteered useful hints concerning the patterns and sizes demanded in their respective districts, the advantage of properly classifying goods and preparing proper invoices, and the necessity of marking packages in the language of the country to which they are sent, besides pointing out many obstacles to the extension of our trade which must be removed by the efforts of American merchants and manufacturers.

The testimony of our representatives abroad, almost without exception, is that the baling of American cotton—one of our principal exports—is particularly defective, suffering much by comparison with the baling of Indian and Egyptian cotton. The covers of our bales are not sufficiently strong to stand the usage to which they are subjected, and the iron bands are too few (there should be ten instead of seven). The practice of screwing the bales into the vessel and cutting off their ends to make them fit the hold is said to result in great loss. The consul at Liverpool gives specific examples of losses of American cotton in transit; the consuls at Chemnitz and at Hiogo furnish photographs of the cotton as it arrives from various exporting countries, which emphasize their condemnation of our packing methods. "More secure packing, a much closer pressing, and greater care in covering or wrapping up," says our consul at Chemnitz, "would be of inestimable and permanent benefit to the cotton trade of the United States," and to guide our balers he describes with minuteness the Egyptian and Indian method of packing cotton for export. The consul at Havre, commenting upon the bad condition in which our cotton arrives, declares that it "can not fail to injure the market for American cotton, which will ultimately be seriously felt by planters and dealers at home." That it can be remedied is obvious from the fact that cotton from other countries arrives in European ports in excellent condition. The coöperation, however, of planters, balers, and dock officials is necessary. Stevedores have done our commerce much harm.

It is suggested by Glasgow merchants that our flour might be loaded and unloaded by means of large canvas slings. As our Pacific grain, placed in jute sacks, arrives in good condition in Liverpool, because loaded by hand, hooks being strictly prohibited, there seems to be no reason why our flour also should not be exempt from hooks and hard usage.

Petroleum in barrels generally arrives in foreign ports in bad condition, and in this case, as in the case of cotton, we have much to learn from our competitors; and we must learn or forego much profit, as the testimony of our Chinese consuls indicates that the Russian oil is supplanting the American in some ports of the Empire—containing millions of oil-users—chiefly because it arrives clean and in as good condition as when loaded at Batoum.

The Amoy correspondent says:

> Experts have declared repeatedly that the quality of American oil is much superior to the Russian, but the tins and wooden boxes, on arrival here, are in such a condition as to require repacking. On this account, opportunities are given to the unscrupulous godown-keepers to make a little "extra" in surplus oil. It is not an unusual thing to buy a new tin of oil, apparently perfect in every outward appearance, but when opened to find it half filled with water.

As the Russian oil cans are contained in cases made of spruce, the boxes are never broken, and there is never any necessity for repacking; consequently there is no opportunity for adulteration.*

The methods of preparing goods for transit to the interior of countries in which pack mules and porters are employed are given in great detail, and by the aid of the elaborate index following the reports those interested may learn what precautions must be observed in each case.

The suggestions made by our consuls as to new methods of shipping goods—for example, drugs and liquids in small, steel drums to Hiogo; as to the advantage that Europeans enjoy over us in many countries by reason of the long credits which they give; as to the opportunities of reducing expenses by observing the provisions of various tariff schedules; and as to the use of wire nails, patent packing paper, zinc-lined cases, patent clasps, and all new appliances—are too numerous to be enumerated here. But the great lesson taught us by the reports is that in many of the countries from which they have been written, and especially in China, Africa, and in the South American countries, where our products should find abundant sale, peculiar conditions exist which must be carefully studied and conformed to if we are to have a large share of the trade. Europeans take excessive pains to learn the tastes and whims of the various classes of people in these countries, and also the condition of their ports, their roads, and their carrying facilities, in order to prepare the kind of goods they desire and to pack them to suit the requirements of their localities. It is hoped that these reports may stimulate and aid our own producers to imitate their example.

---

* But see report from Beirut, Syria, in which the packing of American petroleum is said to be better than that of Russia.

BUREAU OF STATISTICS,
DEPARTMENT OF STATE,
JANUARY 11, 1894.

AMERICA.

BRITISH NORTH AMERICA.

TARIFF FOR PACKAGES.

The following list of tariff charges upon packages entering the Dominion of Canada was transmitted by Consul Dickson, of Gaspé Basin, who obtained it from the collector of customs at that port. Consul Duffie, at Winnipeg, sends the same extract, which he says is taken from "Irwin's Hand Book to the Canada Tariff."

PACKAGES.

The following tariff of values for packages containing goods paying a specific duty is given as a guide in cases where such value can not be otherwise obtained:

Ale, beer, and porter.—Hogsheads, $4 each; quart bottles, 30 cents per dozen; pint bottles, 25 cents per dozen.

Axle grease.—Boxes containing about 1½ pounds, 25 cents per dozen.

Brandy and whisky in flasks.—Flasks (cases of 2 dozen each), 30 cents per dozen and case 20 cents, 80 cents; half flasks (cases of 4 dozen each), 25 cents per dozen and case 20 cents, $1.20; flasks with cups (cases of 2 dozen each), 40 cents per dozen and case 20 cents, $1; half flasks (cases of 4 dozen each), 30 cents per dozen and case 20 cents, $1.40; puncheons, $6; hogsheads, $4; quarter casks, $3; octaves, $1.50; half octaves, $1; quart bottles (1 dozen each), 40 cents and case 20 cents, 60 cents.

Butter.—Tubs and firkins, 25 cents each.

Candles.—Tallow, boxes, 10 cents each; paraffin wax, boxes, 10 cents each.

Carboys.—Containing acids, $1.50 each.

Chicory.—Tins, 28 pounds, 35 cents each; tins, 56 pounds, 50 cents each.

Dates.—Boxes, about 70 pounds, 7 cents each.

Figs.—On boxes inside of crates, 1 and 2 pounds, 1 cent each; 3 and 4 pounds, 2 cents each; 5 and 7 pounds, 3 cents each; 10 and 14 pounds, 6 cents each; 28 pounds, 10 cents each.

Fruit.—Dried apples, barrels, 25 cents each; grape kegs, 10 cents each.

Fruit, dried.—Currants, barrels, 20 cents; half barrels, 10 cents; cases, 15 cents; half cases, 7 cents.

Gin, Old Tom.—Quarter casks, $3 each; quart bottles (1 dozen), 40 cents and case 20 cents, 60 cents.

Gin.—Tuns, $6 each; hogsheads, $4 each; quarter casks, $3 each; octaves, $1.50 each; half octaves, $1 each; red cases, 80 cents each; green cases, 60 cents each.

Hams, in pickle.—Tierces, $1.25 each; dry packed, tierces, 40 cents each.

Hops.—Bales, 60 cents and $1 each, according to size (English being always larger than American bales).

Lard.—Tierces, 335 pounds, $1 each; barrels, 240 pounds, 90 cents each; half barrels, 100 pounds, 35 cents each; fancy tubs, 56 pounds, 20 cents each; kegs, 50 pounds, 25 cents each; wood buckets, 20 pounds, 14 cents each; 10 pounds, 12 cents each. When imported in wood pails, as used for domestic purposes, they are to be rated at 25 per cent ad valorem.

Lime juice.—Quart bottles, 60 cents per dozen; pint bottles, 40 cents per dozen.

Nuts.—Bags, 10 cents each.

Nitrate of soda.—Casks, 20 cents; kegs, 10 cents.

Pearline.—Boxes, 10 cents each.

Pork.—Barrels, $1 each.

Prunes.—Barrels, 20 cents each; kegs, 10 cents each; cases, 15 cents each; half cases, 7 cents each.

Rice.—Bags, 20 cents each; pockets, 10 cents each.

Salt.—Glass jars, 25 cents per dozen.

Soap.—Common boxes, 10 cents each.

Starch.—Boxes, 10 cents each.

Vinegar.—Hogsheads, $4 each; quarter casks, $3 each; quart bottles (1 dozen each), 40 cents and case 20 cents, 60 cents; demijohns—5 gallons, 35 cents each; 3 gallons, 20 cents each; 2 gallons, 14 cents each; 1 gallon, 10 cents each; half gallon, 7 cents each.

Wines.—Tuns, $6 each; hogsheads, $4 each; quarter casks, $3 each; octaves, $1.50 each; half octaves, $1; quart bottles (1 dozen each), 40 cents and case 20 cents, 60 cents.

Wines, sparkling.—Quart bottles (1 dozen each), 60 cents and case 25 cents, 85 cents; pint bottles (2 dozen each), 40 cents per dozen and case 25 cents, $1.05.

The subjoined extract from the Canadian tariff, regulating the levying of duties on packages, was transmitted by Consul Macdonald, of Hamilton:

> The value of all bottles, flasks, jars, demijohns, carboys, casks, hogsheads, pipes, barrels, and all other vessels or packages manufactured of tin, lead, zinc, iron, glass, or any other material, and capable of holding liquids; crates, barrels, and other packages containing glass, china, crockery, or earthenware; and all packages in which goods are commonly placed for home consumption, including cases in which bottled spirits, wines, or malt liquors are contained; and every package being the first receptacle or covering inclosing goods for purpose of sale—shall in all cases not otherwise provided for, in which they contain goods subject to an ad valorem duty or a specific and ad valorem duty, be taken and held to be a part of the fair market value of such goods for duty, and shall be charged with the same rate of ad valorem duty as is to be levied and collected on the goods they contain; and when they contain goods subject to specific duty only, such packages shall be charged with a duty of customs of 20 per cent ad valorem, to be computed upon their original cost or value; and all or any of the above packages described as capable of holding liquids, when containing goods exempt from duty under this act, shall be charged with a duty of 20 per cent ad valorem; but all packages not hereinbefore specified, and not herein specially charged with or declared liable to duty under regulations, and being the usual and ordinary packages in which goods are packed for exportation only, according to the general usage and custom of trade, shall be free of duty.

Consul Macdonald states that the payment of duties under the above regulation does not, as a rule, materially affect the cost of goods to importers and that no change in the manner of packing, with a view to reduce the cost, is suggested by importers. He says that the duty of 40 cents on petroleum barrels is avoided when petroleum is imported in tanks; that the tank when imported, as it is to the Hamilton district, is returned to the United States.

The following information as to duties on packages as they affect cost to the importers was transmitted by Consul-General Ingraham, of Halifax, under date of October 6, 1893:

> Packages manufactured of tin, lead, zinc, glass, or other material and capable of holding liquids; packages containing glass, china, crockery, or earthenware; packages in which goods are packed, and being the same in which goods are commonly placed for home consumption,

including cases in which bottled spirits, wines, or malt liquors are contained, and every package, being the first receptacle or covering inclosing goods for purpose of sale—shall in all cases not otherwise provided for, in which they contain goods subject to an ad valorem duty or a specific and ad valorem duty, be taken and held to be a part of the fair market value of such goods for duty, and shall be charged with the same rate of ad valorem duty as is to be levied and collected on the goods they contain. Packages containing goods subject to a specific duty only, not otherwise provided for, shall be charged with a duty of 20 per cent ad valorem; packages containing fish admitted free of duty not exceeding 1 quart, 1½ cents per can or package; packages containing fish admitted free of duty exceeding 1 quart, 1½ cents per quart or fractional part of a quart; packages containing salt, same duty as if empty; packages containing oysters and other fish, not otherwise provided for, 25 per cent; packages containing salt, 7½ cents per 100 pounds.

Customs orders in council of November, 1886, fixed the following allowances for tare and draft upon packages containing imported sugars, the said allowance to be deducted from the actual gross weight of the sugars as ascertained by weighing on their arrival at their ports of destination in Canada, the weighing to be performed by customs officers and the labor required in handling and weighing to be furnished by the importer: On hogsheads or tierces weighing 1,300 pounds gross or over, 12 per cent; on hogsheads or tierces weighing less than 1,300 pounds gross, 14 per cent; on barrels weighing 250 pounds gross or over, 25 per cent each; on barrels weighing less than 250 pounds gross, 10 per cent; on bags and mats containing beet root, centrifugal, or refined sugars, 1½ per cent; on double bags or mats containing East India, China, Brazil, muscovado, or other similar raw sugars, 3¼ per cent; single, 2 per cent; on baskets, 7⅛ per cent. On any package other than those provided for above, the allowance shall be such as the weighing officers may find to be just and equitable, but in no case to exceed the original weight of such packages before the sugar was placed therein.

BRITISH COLUMBIA.

VICTORIA.

I have made extended inquiry of the merchants of Victoria as to the quantity and character of American goods imported by them, from what portion of the United States they come, how packed, how handled en route and on arrival, and as to all other points that would be likely to interest American manufacturers and exporters. I have also made inquiries of a similar nature as to other cities of British Columbia, with a view of covering, as far as possible, the business of the entire province.

They are unanimous in the opinion that the present manner of packing American goods gives perfect satisfaction. Not one has been able to suggest any improvement. All say that Americans are the neatest and best packers in the world.

All the goods imported come either by rail or steamboat, and they are subject to only such handling en route as is common throughout North America. Nearly all goods for the province of British Columbia come in car lots to Victoria, Vancouver, and New Westminster, the wholesale points, and from there are distributed to the interior. Formerly the interior of the mainland was usually reached by pack animals; but at present that method is not extensively employed, wagon roads having been opened to all the principal places. Dealers at interior points carry small stocks, but aim at variety so far as practicable. Freight intended for them therefore contains small quantities of many kinds of articles, and wholesale merchants prefer to make up these packages here to fill orders and suit the wishes of their customers. It is for this reason that American manufacturers and merchants would not be able to make improvements in the methods of packing now employed. Nearly all the business at the distributing points is with regular customers, so that few special orders are to be filled, and special packing by the American exporter in any class of goods is not required.

Goods received here are usually in large packages, and they are preferred in that shape, for smaller packages would cause an increase in freight charges; and, moreover, for almost all kinds of goods boxes are more desirable than bags or canvas. Bags are cheaper than boxes, but they let in dust and destructive insects, and in storing can not be stacked up in high piles, as boxes can be, because the lower tiers would be injured by pressure.

Dried fruits should be put up in regular-sized boxes of 25 or 50 pounds, and canned fruits and meats in 2 and 3 pound tins. Duty on these articles is paid by the pound, and any fraction over the even pound is charged as a full pound. The same rule applies to most other articles.

The covering of goods to be conveyed on pack horses or mules to Ashcroft or other interior points is not important, so far as protection from the weather is concerned, as each animal is furnished with a waterproof covering that well protects the pack. A horse carries 300 to 350 pounds and a mule 400 pounds. The horse is loaded with 100 pounds on each side and 150 pounds on top. A mule carries a barrel of flour, in sacks of 50 pounds, on each side. All other goods used by modern civilized communities are sent to the British Columbian outposts in the same manner.

Goods are landed at Victoria on the outer or deep-sea dock. It is very capacious, and three or four large steamers can discharge at the same time. The warehouse accommodations are ample. One warehouse covers nearly an acre of ground, another is almost as large, and still another—also a very large one—is now being built. All freights go under roof immediately on being discharged and are fully protected from bad weather.

Large stocks are carried here in Victoria, that of the Hudson's Bay Company alone averaging over $250,000; and its annual business foots up $1,500,000. These stocks embrace all varieties of dry goods, groceries, liquors, provisions, canned goods (fruits, vegetables, and meats), hardware, guns, iron, agricultural machinery, etc.

The use of Canadian and British wares is increasing faster than that of American goods. Relatively, American products are falling behind. This is caused in cotton goods, for instance, by the increase in late years in Canadian manufactures and by the tariff duties. The tariff duties also operate against the importation of many other articles from the United States and in favor of Canadian products, which are free from this added item of cost.

LEVI W. MYERS,
Consul.

VICTORIA, B. C., *September 9, 1893.*

MANITOBA.

WINNIPEG.

EN ROUTE FROM THE UNITED STATES.

Winnipeg is the commercial center of the provinces of Manitoba, Keewatin, Saskatchewan, Assiniboia, Alberta, and the western part of Ontario. It is a city of about 32,000 inhabitants, and is reached by several railroads. Goods from the United States reach this point by rail. Their handling in such transportation is similar to the railway handling of the United States.

WAREHOUSING.

Warehouses are provided, and goods are not liable to be exposed to the elements.

EN ROUTE TO THE INTERIOR.

The Red River of the North, on the west bank of which Winnipeg is situated, is not used now for navigation to any considerable extent. The transportation of goods from this point, and from the principal towns in these provinces, to the country and to the Indian agencies is accomplished by means of "freighters," or wagons drawn by horses or oxen. These wagons are well provided with covers to keep out the rain.

OUTSIDE PACKAGES.

Considering transportation alone, the cheapest material for dry-goods covering is cloth, because its weight amounts to very little. When the character of goods is such that they may be packed in bales, this mode is best and least expensive. A box covering, though considered safe and neat, costs more than a cloth covering, on account of the weight that is charged for in transportation and on account of customs duties charged on the box. Liquids must be imported in hogsheads, barrels, kegs, or bottles. To ship in bottles costs more than to ship in hogsheads, barrels, or kegs, because there is a customs duty on the box in which the bottles are packed, and also on the bottles. Sacks or bags answer well for the purpose of shipping grain, salt, etc. There is scarcely any necessity for the package to be covered with waterproof material.

The best package, consistent with safety, to reduce tariff cost to a minimum is, in my opinion (and it is also the opinion of local merchants who have been consulted), as follows:

For liquids, hogsheads, barrels, kegs, etc., and for dry goods, bales, when practicable, covered with strong material; when in boxes they should be well secured by nails and wires.

M. M. DUFFIE,
Consul.

WINNIPEG, *August 10, 1893.*

NEW BRUNSWICK.

ST. STEPHEN.

Consul Whidden reports that "because of the proximity of the consular district of St. Stephen to the United States, the requirements in methods of packing goods for transportation in no way differ from those for the safe conveyance of the same kinds of merchandise within the limits of the United States. Leading merchants have been consulted, and they concur in the opinion that no desirable changes can be made in the manner of packing."

NEWFOUNDLAND.

ST. JOHN'S.

I have consulted different importers and have found all perfectly satisfied with the manner in which American goods are packed.

From Boston, goods are generally shipped by sailing vessels, and consist principally of notions of all kinds, nets, lines, twines, oils, varnishes, medicines, furniture, and marble; also dry goods (in bales), hardware, and groceries.

Goods from New York, Baltimore, and Philadelphia are shipped by steamer, and consist of dry goods, hardware, canned meats, fruits and vegetables, flour, beef, pork, meal, hams, bacon, canvas, leather, leather ware, cordage, kerosene oil, butter, sugar, paints, paper, machinery, etc., which are landed at wharves and placed in warehouses.

Goods for the interior are shipped by rail and coast steamers.

THOS. N. MOLLOY,
Consul.

ST. JOHN'S, *August 19, 1893.*

NOVA SCOTIA.*

HALIFAX.

EN ROUTE FROM THE UNITED STATES.

Goods reach Halifax from the United States chiefly by steamers from Boston and New York, only comparatively little merchandise coming by sailing vessels or by rail.

LANDING AND WAREHOUSING.

Steamers come alongside the wharves, lighters not being used, and the freight is landed into safe and capacious warehouses.

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* Answers to the circular were also received from the consular officers at Moncton and Windsor, but the reports from Halifax and Pictou fully cover the subject for the province.

As to the handlings and usages to which merchandise is subject in transportation from the United States or after arrival, inquiries among leading houses disclose no dissatisfaction or even criticism. Consultations with leading merchants and shippers are suggestive of nothing but satisfaction in their dealings with American exporters, or the transportation of goods, or the packing, or its material, even with a view to reduce the tariff cost.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by rail, as well as by steamers plying along the coast to different harbors, where transshipment is made to stages or country teams for interior localities.

DARIUS H. INGRAHAM,
Consul-General.

HALIFAX, *October 6, 1893.*

PICTOU.

VARIOUS METHODS OF PACKING.

Such American dry goods as reach this district come invariably by rail, in common dry-goods boxes of various sizes, satisfactorily packed, and without charges for packing or boxes. On the other hand, English exporters always charge for bales, coverings, and boxes. I was shown a number of invoices of English goods, each of which had an accompanying bill for boxes, "packing" (cloth bales), dock dues, etc. The charges for boxes amounted to about 1⅔ per cent of the value of the invoices, cloth bales and such like covering amounting to much less, as reckoned by the importer. But the packing was undeniably first class. Canadian wholesalers usually charge merchants 50 cents for common dry-goods boxes, a much lower price than that demanded in Great Britain, where, indeed, charges on some boxes amount to about $2.70 each.

English goods are usually brought across to Halifax in regular line steamers and transshipped, either by boat or rail, to this district. It would seem that American exporters might compete with their rivals across the Atlantic to some extent; but, if the freight charges on all American exports to this district are as heavy as those on one invoice of New York goods shown me by a Pictou importer, the field might as well be surrendered without a struggle, since they amounted, as the importer said, to prohibition. The amount of this invoice was only $35.73, the goods being curtain poles and fixtures; but the freight charged from New York amounted to $5.26, the freight to Boston on a well-known line being $4.14, and the remainder ($1.12, which was satisfactory) was for bringing the goods from Boston to Pictou by steamer.

Nearly all the dry goods sold in this district are either of Canadian manufacture or are imported from England and Scotland. Each dealer I talked with spoke of the Dominion tariff as a great obstacle in the way of importing dry goods from the United States.

In packing dry goods for export one merchant suggested that there be used "medium-sized cases, not over 4 feet square, with boards about 1 inch thick, and the ends of the cases protected by wooden or iron hoops.

Groceries.—The amount of American groceries imported into this district is comparatively small, though the facilities for shipping goods from the United States by boat and rail are—at least in summer—fairly satisfactory.

Fruit in the season is more largely imported than are any other products from the United States. It comes by steamer from Boston, packed in wooden boxes, barrels, and crates, according to the kind of fruit. A leading Pictou grocer told me that the packing of these goods was entirely satisfactory to him, and, in fact, he thought that one reason why American exporters were forging to the front was on account of their excellent packing. This hardly agrees with the talk of another prominent merchant, whose opinion on this phase of the packing question I will give under another head.

Canned goods are used to a very large extent in this district. American canned corned beef comes in for no small share of favor, and I am informed by grocers that its importation into the Dominion is immense. Pictou dealers order it of a Canadian agent, and it comes by rail in bond to the consignee, who pays all the expenses incident to getting possession of it. The style of packing of this popular article varies somewhat with the size of the cans, but all sizes come packed in new, planed, wooden boxes, which, not being heavy, cause little breakage. The largest-sized box contains six 6-pound cans, a smaller size has twelve 2-pound cans, and still another is closely packed with twenty-four 1-pound cans. Dealers here tell me that this is as satisfactory a manner of packing such goods as they can suggest. I am informed, however, that as a general thing the smaller the package the less breakage there will be. This applies to nearly all kinds of goods.

Strange to say, no American toilet soap is now imported into the district, the tariff of 10 cents per pound and 10 per cent ad valorem having effectually prohibited its importation. Formerly, when the tariff was lower, a large amount of such soap was sold in this district.

Stove polish is imported from Massachusetts, and comes perfectly packed in wooden boxes about 2 feet long by 1 foot deep and nearly 1½ feet wide. Baking powder and Baker's cocoa are also sold here to some extent.

Neither teas nor coffees come from the United States, but are obtained from English exporters. I understand that there is a more or less firmly planted tradition here that Americans do not have good teas, and that their prices are extremely high. The Dominion Government levies a tariff of 10 per cent on tea imported from the United States, that from England coming in free.

One of the chief American articles handled by the grocers of this district is kerosene oil. It comes in the common oil barrels familiar to American country grocers. Considerable fault is found with these barrels on account of leakage. This, I was told, was owing in great measure to old bungholes being rebored, old barrels being, but for this, preferable to new ones. A local grocer some time ago refused to accept an invoice of kerosene in barrels, because so much oil had escaped en route. An agent of the shippers came to see him about it, and agreed that too much of the oil had been wasted, and did not insist on the merchant paying for it. Kerosene is brought here in vessels, usually Canadian, from New York and is ordered through a provincial agent, who charters the vessels as best he can. Enough for four or five towns is landed at Pictou and then transshipped, mostly by rail, to other places. Cargoes of kerosene are also sent by vessel to Sydney, C. B., thence a part is transshipped to North Sydney and other towns near by. Usually the vessels carrying this oil have a general cargo for the provinces. It is considered the cheapest way in which to send freight. Since the restriction on the importation of coal oil in bulk, or tank, was abolished last February, considerable illuminating oil has been coming in that manner into Canada, but merchants here say that it is practicable to import in that way only to those towns or cities where there are good barreling facilities, which are not common in this district. On the whole, merchants in this vicinity prefer to import oil in barrels by vessel, notwithstanding the leakage, which is often considerable, and notwithstanding the tariff charge of 40 cents on each barrel. This last, as well as the tariff on the oil itself, enters into the retail price to consumers, and even the leakage has to be taken into account in this respect.

None of the staple groceries, such as sugar, flour, starch, tobacco, etc., are imported into this district from "across the line." Some Canadian branches have been established for a few American tobaccos and cigars, for which there is a call, in order to escape the tariff. The duty on cut tobacco is considered here prohibitory, being 45 cents per pound and 12½ per cent ad valorem. On cigars it is still higher, being $2 per pound and 25 per cent ad valorem. Cigars that before the present tariff sold for 10 cents apiece or three for a quarter, have to be sold now, I am told by dealers, for 15 cents apiece or two for a quarter.

American pork and beef in barrels is imported into certain parts of this district, and, like kerosene, is usually brought in sailing vessels with other articles comprising a general cargo.

The consular agent at Cape Canso, a prosperous town in northeastern Nova Scotia, with no railroad facilities, and noted as a fish and cable station, informs me that imports of American goods at that place "are mostly confined to beef, pork, cotton nets, seines, lines, twines, and requisites for the cable companies' plants." These goods are brought by sailing vessels and steamers, and are landed at good wharves, where warehouses protect all freight from exposure. He also says that "the demand for these goods is growing with the town," and that "no change in the manner of packing is needed." It is in towns like Cape Canso, which many other towns in this district resemble, that there is a good field for American exporters of groceries.

The consular agent at Arichat, C. B.—Mr. Campbell—writes that American groceries reach his port by sailing vessels and are well handled and housed on the wharves. They should come "in small, strong packages, 3 feet by 2 feet deep and wide, well protected with wooden hoops at the ends; also in barrel packages, well coopered—barrels not supposed to be water-tight." Mr. Campbell, who is himself a merchant of experience, says: "It is not necessary to have packages water-tight. The principal thing is to have them well nailed and bound with hoops at both ends."

Another important town in Cape Breton to which American goods are sent is Port Hawksbury, on the Strait of Canso, which is something of a distributing center for that part of the province. Consular Agent Bain, at that place, writes as follows:

> The most of the goods from the United States to this port come on the regular line of steamers from Boston. They are carefully handled, without any change in transit, and are always landed on wharves where warehouse accommodations are ample. A Dominion sufferance warehouse for bonded goods is here, where they are stored until taken by the consignee or forwarded to destination by rail or lake steamers. Goods thus forwarded receive careful handling regardless of size, weight, or quantity. We have good transfer accommodations. Goods to any point in Cape Breton, or Antigonish or Guysboro counties are forwarded in bond to destination with as little detention as possible.

Sydney, the principal port in Cape Breton, a stopping place for a great many American fishing vessels, has heretofore mostly depended on sailing vessels for the transportation of American groceries, although it is connected with the Intercolonial Railroad; but the consular agent there—Mr. Burchell—informs me that after September 1 a steamer carrying the French mails to and from Boston will call there going to and returning from St. Pierre, Miquelon Islands.

Liquids.—The liquids imported from the United States into this district amount, so far as I can learn, to little. No liquors or beers are among them, unless some is sent to points in or near Cape Breton. This is not owing much to the "Scott act," a sort of prohibition measure in force here, but, doubtless, almost entirely to the Dominion tariff of $2.12½ per gallon on imported spirituous liquors and the smaller specific duty on ales and beers. Druggists inform me that the tariff of 50 per cent on proprietary medicines is, in effect, nearly prohibitory, but that some standard American articles are sold, and that a few of these are put on the market through a Canadian branch. I am advised that heavy goods should be sent in strong, hard-wood casks, ironbound, of not over 50 gallons capacity, those of 15 to 40 gallons preferred.

Iron manufactures.—The iron and steel manufactures imported from the United States into this part of the district are inconsiderable in extent, and I have no reason to think it is different in other parts. Some American mowing machines are on sale here, but the smaller agricultural implements are not imported, at least so I am told by most of the dealers here. Some of the American sewing-machine companies have Canadian agents here, but their trade, I think, is not large. One American article that has more wood than iron in its manufacture is sold here, despite a very heavy duty imposed on it. I refer to clothes-wringers, the duty on which, as figured by a dealer in these goods, amounts to about 90 per cent. There is levied on them a specific duty of $1 apiece and an ad valorem rate of 30 per cent. Still, they are brought across the line by rail and boat, well packed in wooden boxes. One intelligent merchant, in speaking of the manner in which some iron manufactures should be sent, said: "All that can not be packed, such as bar iron, steel, and bulky castings, can be sent forward without covering, bound in the usual way."

Hardware.—The amount of hardware brought across the line to this place and surrounding towns is small. One dealer told me that American edge tools were better to handle than other kinds, and that they came mostly by rail, packed tightly in strong but small wooden boxes. A retailer of long experience said that such small merchandise should be packed in wooden boxes 2 feet square, wood not less than 1 inch thick, well fastened with nails, and protected at both ends with wood or iron hoops. Some stamped, japanned, and porcelain wares of American make are imported by rail, and, as there is no tariff on the wooden boxes they are packed in or charges for the same by the American exporter, a dealer said he could sell some of these things, despite the tariff on them, more cheaply than he could those of Canadian manufacture, and that they also gave great satisfaction.

Boots and shoes.—About the only importer of American boots and shoes in this part of the district receives them in wooden cases of two or three sizes, one containing twenty-four pairs, another twelve pairs, men's sizes. The smaller size of box is preferred, as its contents arrive in better condition. These goods come by rail, that method proving the most satisfactory, dispatch and cheapness considered. There is no tariff on wooden boxes or charges for them by exporters. This merchant informed me that Canadian wholesalers, on the contrary, charged him for boxes and sometimes for truckage. His greatest call for American goods is in the line of children's and misses' boots and shoes.

Lamps and goods liable to breakage.—Every fall some of the merchants here put in new stocks of all kinds of lamps, in which those of American make are well represented. The importer has to pay duty on the packages, as well as on the goods, and is charged by the exporter for the wooden box. One of these importers of American lamps and fixings said the tariff, freight, etc., on them averaged about 40 per cent of the value of an invoice, and that there was always more or less breakage, owing to bad packing. He thought that more care should be exercised by American exporters in packing. He showed me a fairly large invoice of American goods, in each lot or package of which there had been breakage. These had come by rail in wooden boxes or barrels of easily portable size, many of which being, however, quite old. This importer said that English packing was the best in the world, but was well charged for by exporters. Some importers, however, were willing to pay for packing when it gave such satisfaction. English exporters sometimes charged for the "marking." He thought it would give more general satisfaction if American exporters of goods liable to breakage should charge for packing and then do the work well. The transportation of light-weight goods by rail is cheapest.

To sum up, the best method of packing and shipping goods is to have the bale, barrel, or box as small as practicable; the goods liable to exposure or breakage packed as carefully as possible, even if a separate charge is made for the packing, as in England, or an extra price added to the cost of the goods. Light-weight goods should be sent, as a rule, by rail and most liquids and heavy articles by steamer or sailing vessel; the coarse dry goods, when possible, sent covered in heavy bagging, so as to save freight and charges on boxes, the exporter always remembering that when boxes are charged to the consignee they are made dutiable here and when not charged for are supposed to be added to the cost of the goods.

MARK P. PENDLETON,
Consul.

PICTOU, N. S., *August 15, 1893.*

ONTARIO.

HAMILTON.*

EN ROUTE FROM THE UNITED STATES.

Dry goods reach this district from the United States exclusively by rail, securely packed, ordinarily in strong boxes or cases of wood, which are sometimes lined with oilcloth. These goods are subject to the same handling and usage while in transit as if consigned to a destination in the United States, with the exception that the packages containing the goods are subject on arrival to examination by the customs officers.

Grindstones, which are classed as hardware by the importers here, and coal (anthracite and bituminous) come by sailing vessels, and are the only American goods which come by water to this district.

WAREHOUSING.

Ample warehouses are provided, in which goods are protected from the elements.

EN ROUTE TO THE INTERIOR.

These goods are reshipped to the interior by rail when resold, unless when consigned to Manitoba or the Northwest Territories, in which case a portion of the transit is sometimes effected by steamboat.

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*Answers to the circular were received from the consular officers at Amherstburg, Chatham, Galt, Guelph, Kingston, Ottawa, Paris, Port Stanley and St. Thomas, Stratford, and Windsor, but this report from Hamilton fully covers the subject for Ontario.

OUTSIDE PACKAGES.

The mode of packing meets all the requirements of importers. It is not considered necessary that the package be made waterproof; but, if it contains dry goods of a very fine description, the use of oilcloth lining is recommended.

Geographical conditions, postal facilities, and the frequent means of personal communication existing, coupled with the willingness of exporters to make any change suggested by importers as desirable, have had the effect of perfecting the system of packing, handling, and transporting goods consigned to points in this district from the United States.

INVOICING GOODS.

The following suggestions concerning the invoicing of goods when shipped to this district from the United States may prove of interest, and may be advantageous to both the exporter and the importer by facilitating the examination of goods on arrival at customs:

(1) The amount sometimes charged in invoices under the head of "packing" is always incorporated by customs officers with the value of the goods mentioned in the invoice, and is consequently liable to the payment of the same rate of duty as that applicable to the goods.

(2) Some exporters, when invoicing goods shipped from the United States to this district, enter the contents of several boxes, bales, or crates indiscriminately in the invoice. This practice is productive of much disadvantage to the importer and inconvenience to customs officers. It is suggested that when two or more packages are sent under the same invoice each package be numbered and the contents thereof entered consecutively on the invoice and noted in the margin in a manner to indicate the number of the package in which the articles mentioned in the invoice are to be found, thus facilitating examination and rendering unnecessary the opening of all the packages containing the shipments by customs officers when desiring to certify to the correctness of any particular entry on the invoice.

C. F. MACDONALD,
Consul.

HAMILTON, *August 15, 1893.*

QUEBEC.

QUEBEC.*

As this port is distant only twenty-four hours from New York city, and as shipments are made direct by railroad, without handling, goods from the United States are packed in the same manner as when shipped to any part of the State of New York.

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* An answer to the circular was also received from Gaspé Basin.

Shipments from the United States are usually in bond, and, on arrival, are placed in the Government warehouse for appraisal.

The goods received at this port are exclusively for home consumption.

FREDERICK M. RYDER,
Consul.

QUEBEC, *August 15, 1893.*

MEXICO.

LA PAZ.

EN ROUTE FROM THE UNITED STATES.

Goods shipped to this district from the Western and Eastern States come via the Sonora Railway to Guaymas and from there by vessels. Goods from the Pacific coast invariably come by steamer or sailing vessel direct to this port.

UNLOADING AND LANDING.

Goods are landed by lighters from the larger vessels. Vessels of 200 or 300 tons can be unloaded at the wharf.

WAREHOUSING.

Warehouses are provided by the custom-house for merchandise.

Since August 1, 1893, a bonded warehouse has been established at Guaymas for goods in transit.

EN ROUTE TO THE INTERIOR.

All goods are forwarded to the interior by wagons and to the more remote places by pack mules; in the latter case packages should not be over 300 pounds in weight.

OUTSIDE PACKAGES.

The method adopted for packing fine dry goods is in light cases lined with tin, and for common cotton goods bound bales, with oilcloth for an interior lining.

DUTIES ON PACKAGES.

In many instances, such as on candles, pastes, acids, fruits and vegetables, etc., duties are charged on the gross weight, and, again, on a number of articles the duties are based on the weight of the interior packing, such as on canned goods, bottled wines and beer, etc., while such articles as tea, leaf and cut tobacco, liquors, wines, and beer in barrels pay by net weight.

JAS. VIOSCA, JR.,
Acting Consul.

LA PAZ, *July 27, 1893.*

NOGALES.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States come by railway only, are subjected to many transfers en route, and often arrive in bad condition.

UNLOADING AND LANDING.

They are unloaded and stored in the depot warehouse on the American side and remain there until the customs brokers check and make their entries for import, when they are again loaded into cars and crossed into Mexico.

EN ROUTE TO THE INTERIOR.

Goods shipped to the interior are mostly packed on burros (the small donkeys of the country), and the packages should be not more than 30 inches long, 15 inches wide, and 20 inches high, and weigh from 100 to 250 pounds.

Manufactures of wool and cotton sent by burros to the interior (especially to mining camps) should have waterproof covering, and the shippers should endeavor to ascertain whether the goods are to be transported into the interior by wagon or pack from the railway station.

The mining companies operating in the interior are obliged to use pack animals for the greater portion of the distance in transporting their supplies from the railway stations to their mines, consequently packages weighing more than 250 pounds require repacking.

OUTSIDE PACKAGES AND DUTIES.

Dry goods should be baled whenever practicable, and the bales should not exceed 250 pounds, especially when they are destined for interior points. Large and heavy boxes should not be used under any circumstances, as the long distances and high freights add too much to the cost of the goods; and the many transfers while in transit subject the large boxes to rough handling, causing them very often to arrive at their destination broken and the contents in a damaged condition.

On all manufactures of wool and cotton put up in paper boxes a duty is paid on the weight of the boxes at the same rate as their contents, consequently heavy paper boxes should be avoided; and, in fact, as the duty is very heavy, paper boxes should be entirely dispensed with whenever light wrapping paper would answer the purpose.

Insertions, laces, and ruchings should not be wound on boards or heavy paper, nor inclosed in heavy paper boxes, as the rate of duty per pound is very high on these and similar articles, and the duty is assessed upon the gross weight.

Groceries pay duties mostly upon net weights, with the exception of crackers, sugar, candles, soap, flour, and lard. Boxes and crates for lard should be avoided as far as possible, as the duty is a little over 4 cents per pound gross weight. Sugar and flour should be put in strong bags, especially when destined for the interior.

Liquids should be put up in tin cans of not more than 10 gallons each; oils especially should never be shipped to this country in wooden packages. Mixed paints should be put up in tin cans hermetically sealed. Spirits can be shipped in their original packages, as duty is only assessed upon the contents.

For iron manufactures boxing or crating should be dispensed with as far as practicable, and when boxing or crating is absolutely necessary the packages should not be too heavy.

Hardware consists of such a vast variety that undoubtedly most of the articles require boxing. Belting, both leather and rubber, should be covered with bagging only, as duty is assessed on the gross weight, including the coverings. As far as possible, all articles should be put up in bundles and covered with bagging, in order to avoid the payment of duty and freight on heavy packing materials.

REUBEN D. GEORGE,
Vice-Consul.

NOGALES, *August 10, 1893.*

PASO DEL NORTE.

EN ROUTE FROM THE UNITED STATES.

Goods intended for export from the United States to Mexico through the port of Paso del Norte arrive at El Paso, Tex., immediately opposite, by four railroads—the Southern Pacific; Atchison, Topeka, and Santa Fé; Texas and Pacific; and the Galveston, Harrisburg, and San Antonio. The goods are held in the cars at El Paso, if in carload lots, but if in small lots, they are unloaded into a warehouse provided by the roads jointly until such time as the broker in charge of them makes the papers necessary for their importation into Mexico. Carload lots are usually imported into Mexico in the car in which they arrive at El Paso, while small lots are either reloaded into cars or transferred to Mexico in wagons. When importations are made in cars, the goods remain in them until the Mexican collector of customs names an inspector to dispatch the freight, when the car is opened at a platform and enough packages removed to admit of counting the entire number and to place at the disposition of the inspector such packages as he may wish to revise. The inspection is usually made at the platform, without warehousing the goods, after which they are immediately returned to the car and delivered to the Mexican Central Railway to be forwarded.

UNLOADING AND LANDING.

All goods, except those in carload lots, are unloaded from the railroad cars or wagons at the warehouse of the Mexican custom-house, where they are inspected and cleared.

WAREHOUSING.

At Paso del Norte the Mexican custom-house has provided two first-class warehouses—one for freight by railroad, the other for freight by wagons—where the goods are stored during the time they are being cleared. All goods thus stored are perfectly protected against the weather.

EN ROUTE TO THE INTERIOR.

All goods cleared at Paso del Norte, or at any other frontier point, are subject to reëxamination at their destination, except when the destination of the goods is some point off the railroad. At most of the stations on the Mexican Central Railway the Mexican Government provides guards, known as *gendarmeria fiscal*, who reëxamine all shipments. The principal station of these guards is at Toreon, where the Mexican International Railway crosses the Mexican Central; and at that point all shipments going south have to undergo a new examination. South of Toreon no *gendarmeria fiscal* now exists.

All shipments from Paso del Norte go by rail; but those destined to Sierra Madre points are wagoned from Chihuahua or Jimenez as far as the roads permit, after which they are carried by pack mules to final destination. For goods which have to be carried by mules the packages should be of such form as to permit of the easy loading of 300 pounds, which is the maximum load for each mule. The general custom is to put up goods in packages not exceeding 150 pounds each, and of such form that one package can be loaded on each side of the mule—*i. e.*, in packages 2 by 2 by 3 feet—although if the goods are of such character that the maximum weight can be put into packages of smaller dimensions than these, it would be much better to do so.

OUTSIDE PACKAGES.

As the transportation to such points off the railroad requires so much time, the outside packing for the goods should be of a very substantial character. Small kegs, cases, or bales of strong material are, of course, the most suitable form of package that can be used, although pieces of machinery and other articles of irregular shape have likewise been transported by mules.

Dry goods.—These should be packed in good, strong cases, with an inner lining of oilcloth, in order to prevent the goods from getting wet. If packed in bales of 150 pounds, as is done in some instances, in addition to the oilcloth lining, it is also desirable that some small boards be placed around the package so that the hooks and other instruments used in handling the bales may not damage the contents.

Groceries.—These can not be packed in bales; they should always be in cases. If there are any articles which come in glass jars or bottles, the packing in straw or sawdust is an absolute necessity, as otherwise the contents would be exposed to breakage.

Liquids.—The above remarks are also applicable to liquids, such as beer, brandies, mineral water, etc. However, as brewers and exporters of liquors generally have a large trade and are acquainted with all these requirements, the manner of packing that has been adopted can hardly be improved upon.

Iron and hardware.—This class of goods can be packed in any way, the only precaution being that when certain parts of machines are detached they should be carefully wrapped or cased. The breaking of one of these delicate parts of machinery frequently occasions long delays until a new part is received. This is particularly the case where the machinery is to be used at isolated places and in the mountains, and it often necessitates the closing down of all operations. As a general rule, machinery and hardware do not become broken very easily and do not require more than ordinarily strong packing. The best package is decidedly the most profitable one, as the saving in the quality of the packing is in no way to be compared to the loss in case of breakage en route after the duty is paid.

DUTIES ON PACKAGES.

The Mexican customs tariff has only specific duties, and the larger part of the articles pay on the legal weight—*i. e.*, the weight without the outside covering, box, or case.

The rates on some of the leading articles of export from the United States to Mexico are as follows per kilogram of 2.205 pounds:

Mineral oil, purified	$0.10
Wooden manufactures	.40
Flour	.10
Cotton manufactures	1.30
Chemical products	.75

On the following articles duties are levied according to the gross weight per kilogram:

Firearms	$1.75
Explosives (dynamite)	.03
Stearin in bulk	.10
Cotton fabrics	1.30

Articles on which duties are levied according to net weight are as follows per kilogram:

Cotton-seed oil, impure	$0.05
Silk fabrics	16.00
Mixed silk fabrics	9.00

Customs duties on other goods are charged by the square meter, by the piece, by the thousand, by the head, by the liter (0.086 gallon), by the pair, or by the hectogram. There is no general complaint about the rate of duties on gross weight, as the rate generally corresponds to that provision.

The "free zone" is a strip of territory 20 kilometers (12.427 miles) wide, lying immediately south of the line dividing the United States and Mexico, extending from the Pacific Ocean to the Gulf of Mexico.

Customs duties are charged to the extent of only 10 per cent of the actual duty on goods for shipment to points within this "zone."

THEODORE HUSTON,
Consul.

PASO DEL NORTE, *September 15, 1893.*

TAMPICO.

EN ROUTE FROM THE UNITED STATES.

Merchandise of all classes reaches Tampico from the United States by water—steam or sailing vessels—and is not subjected to rehandling en route.

UNLOADING AND LANDING.

All classes of goods are landed at wharves in a majority of cases, though sometimes the services of lighters are brought into requisition.

WAREHOUSING.

Ample warehouse facilities are afforded for the storage of merchandise, and no goods are left exposed to the elements.

EN ROUTE TO THE INTERIOR.

Shipments to the interior are made by rail and water—the Mexican Central and Monterey and Gulf railways and the Panuco River. The rail shipments are subjected to about the same usage as obtains in railroad freight handling in the United States. The river transportation is in the hands of carriers of various classes and may be compared with the methods in vogue on the smaller navigable streams of the United States as to capacity and methods of handling goods.

OUTSIDE PACKAGES.

Proper packing is an important feature in the export trade that has been much more closely studied by European than by American shippers. Light boxes, strong and well bound, are preferred for such goods as can be accommodated to them.

Dry goods should be wrapped in a waterproof covering before being boxed. European linens come in compressed bales. The goods are first wrapped in light cloth or strong paper, then covered with a waterproof wrapping, over which strong jute bagging is drawn and well bound down with iron hoops.

American groceries meet all requirements of this market in the matter of packing, and uniformly reach the purchasers here in better condition than the same class of goods from Europe.

Liquids packed by American shippers also meet the requirements.

Hardware should be strongly boxed, the boxing as light as may be consistent with safe transit, and care should be taken to so wrap or pack the various articles that they will not be injured by shifting or abrasion.

Machinery involves too many forms to make details possible respecting proper packing. It should be "knocked down" and packed in the smallest space possible, and the bolts, nuts, washers, etc., should be separately boxed.

Small iron and steel rods and bars should be packed in bundles of about 100 pounds each, securely tied with iron straps and tagged with leather or tin, preferably the latter, with the markings stamped thereon.

Crockery is preferred crated, packing in barrels not being in favor here.

Furniture should be "knocked down" for shipment. The finer goods should, in addition, be wrapped and lightly but strongly crated to avoid injury to finish from accidental knocks or bruises.

Sulphate of copper (bluestone) should be packed in boxes of about 50 pounds each. Its use is largely confined to the mining camps, whither it must be transported by pack mules, and boxes of the weight named are most convenient for packing. Barrels are inconvenient in making up a pack load; they break easily, and loss results.

The packing requirements for shipment to this port are so nearly like those of the United States that any shipper seeking to reach this market can easily conform to them. The main trouble with American shipments received is due to carelessness, probably on the part of employés. European shippers are more strict in this respect than are Americans. They keep a record of packing, and any goods injured in transit through lack of proper care of the packer are reported to them. The result is reform on the part of the employé responsible or his discharge.

DUTIES ON PACKAGES.

The majority of articles imported pay duties on "pesos legal," that is, the weight includes the inside packing. As an example, perfumery, fine soaps, parasols, fans, fancy candies, and many classes of drugs pay duties on the inside boxes or wrappers, after deducting the outside packing or boxing. "Net weight" means on contents only. Beer, in bottles or kegs, pays on net weight, the weight of bottles, cases, and barrels being deducted. "Gross weight" ("peso bruto") means duties payable on goods and packing. Brass furniture, for instance, pays on "peso bruto," while fine wood furniture pays on "peso legal."

A. LIEBERKNECHT,
Consul.

TAMPICO, *August 2, 1893.*

VERACRUZ.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district from the United States by way of the Gulf of Mexico, and are subject to the handling usual on board ship.

UNLOADING AND LANDING.

Goods are landed by lighters.

WAREHOUSING.

Warehouses are provided for perishable goods; other goods are exposed to the elements.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by rail as far as rail extends and handled as is customary on railroads. They are then packed for transport generally on mules, 200 pounds being the usual load a mule is supposed to carry. This city being a wholesale point, bulk is broken and packages are made to suit the mode of transportation to final destination.

OUTSIDE PACKAGES.

The package should be waterproof if possible, but it makes no difference whether it is a bale, box, sack, or barrel.

Dry goods.—Should be packed in cases or bales; size immaterial. They should be first wrapped in tar paper to prevent moths and other insects of this section from damaging the goods.

Groceries.—All farinaceous or any other class of goods liable to damage from insects should be packed in tin-lined cases, tightly closed. Canned or bottled goods should be packed in strong wood boxes; size immaterial if they are securely packed.

Liquids.—This class of goods should be packed in casks, barrels, half barrels, and kegs, according to destination. All bottled goods, except malt liquors, should be packed in boxes holding 2 dozen quart bottles or 4 dozen pint bottles. Bottled beer does well enough in barrels the size of common flour barrels.

Iron manufactures.—The merchants with whom I have talked on the subject of packing say that the present method used in the United States meets all the requirements here. The same may be said of hardware, except cutlery and what is known as shelf goods, which should be securely wrapped in oiled paper or in some kind that would prevent moisture from penetrating and causing the articles to rust. Extra care should be used in the packing of fine hardware, on account of the moisture of this climate.

DUTIES ON PACKAGES.

Customs duties are charged in some instances on the net weight, but in most cases on the gross weight. But it would be necessary to send the tariff laws of this Republic and of each State thereof in order to show to what extent the imposition of duties affects the cost of goods to importers. I can give no correct estimate. I would say, however, that all goods shipped to any port in this district should be packed in light but strong material. Where they are to go inland away from railroad points they should be packed in boxes of about 100 pounds in weight, size not to exceed 2 to 2½ feet long, 1½ to 2 feet high, and 1 to 1½ feet wide; sacks and bales should be about the same size and have a double covering of bagging.

CHARLES SCHAEFER,
Consul.

VERACRUZ, *August 21, 1893.*

CENTRAL AMERICA.

COSTA RICA.

SAN JOSÉ.

EN ROUTE FROM THE UNITED STATES.

Costa Rica has two ports—Port Limon and Punta Arenas.

Goods reach Port Limon by steamer or sailing vessel, and are subject to ordinary handling. They are landed at wharves. Ample warehouses are provided, and there is no exposure unless it is accidental. From Port Limon the transportation to the interior is by rail, involving careful handling.

Goods reach Punta Arenas generally in good condition, especially those shipped from San Francisco. Those coming from New York undergo severe handling, being taken out of the ship at Colon, conveyed by rail across the isthmus to Panama, and again shipped on steamers to Punta Arenas. They are landed by lighters. The Government provides warehouses, and there is no exposure.

EN ROUTE TO THE INTERIOR.

From Punta Arenas goods are transported to the interior by means of ox carts, on which, once loaded, they remain until they reach their destination. In some instances they are conveyed short distances by rail.

The size of the package should in no case exceed 10 cubic feet, as the carts are very small.

The weight of the package should not be more than 300 pounds.

What follows will apply to goods shipped to either Port Limon or Punta Arenas.

DUTIES AND PACKING.

Duties are paid on the gross weight, and therefore the outside covering for all goods should be of the lightest weight possible consistent with safe transportation.

Dry goods and articles not easily broken should be baled. For this class of goods boxes should never be used.

Fine goods and goods destined for Punta Arenas should have oilskin or waterproof inside covering. Bales should also be roped or have light iron "strapping."

Yankee notions and fancy articles may come in light-weight cases, with light iron "strapping." Where iron "strapping" is used it renders possible a case of lighter weight.

The packing of various kinds of goods in one bale should be avoided, as in such cases the packages are entirely taken to pieces for customs purposes, thus making the repacking of pressed bales almost an impossibility.

Hats and caps should have the lightest of packing, as the duty is extremely high.

Almost all kinds of boots and shoes can be baled with soft dunnage at a good profit to the consignee. If packed in cases, the carton should not be made into boxes, but should be simply placed in sheets above the boots. By this method 63 cents (20.6 cents in American gold) per kilogram (2.205 pounds) is saved in duty on the carton.

Groceries should be packed in light boxes. Such articles as raisins, etc., should have waterproof covering.

Flour, beans, corn, oats, and grains of all kinds should be sacked, but the sacking material should be first class. There should be four 50-pound bags of flour inclosed in one package. Meal should be in barrels, on account of its liability to become sour. Salt should always be in sacks.

Paints, turpentine, paint oil, and varnishes, except when in very small tins, should be crated. Crates with iron "strapping" should be used for these articles, instead of whole cases.

Liquors in bottles must be well protected, but by this is not meant that they should be sent in weighty cases and heavy bottles. Bottles should have straw pockets. If plenty of straw were used, the heavy bottles and cases now in use could be replaced by light ones. A layer of straw around the whole package is very effective. It is well to have these cases of bottles strapped two together, as no other class of goods is so liable to be pilfered.

Iron manufactures, as a general thing, need no more packing than is required for safe transportation in the United States. The smaller pieces should, however, be securely bound together.

Hardware must be cased and strapped with iron. Where it is possible, packages should not weigh over 250 pounds.

Articles such as axes, etc., should be boxed securely and bound with iron strips.

A great point in packing goods for Costa Rica is to understand thoroughly how to classify and discriminate with reference to duties. A serious difficulty to be avoided is the packing of high with low duty goods. Goods of the same class and similar rate of duty should go together. Also, there should be accuracy in consular invoices. If an article is cotton, the consular invoice should read cotton, not silk or wool. Merchants complain of the negligence of American shippers in this regard.

It would be well for houses seeking this trade to carefully study the question of classification of goods and the rate of duty in reference to the interests of the consignee. Strict attention should be given to the suggestions made by the purchaser, even though they appear trivial.

Another point is to send salesmen to these countries who have had sufficient practical experience in the factory to know if it is possible for their respective houses to turn out the article the customer desires.

HARRISON R. WILLIAMS,
Consul.

SAN JOSÉ, *September 2, 1893.*

GUATEMALA.

GUATEMALA.

EN ROUTE FROM THE UNITED STATES.

Nearly all merchandise exported from the Atlantic ports of the United States reaches Guatemala via the Isthmus of Panama. Some goods are sent from New York and New Orleans to Port Livingston, on the Atlantic, and there is a regular line of steamers running from New Orleans to that port. Goods which come via Panama, as well as those shipped from the Pacific ports of the United States, are landed at either San José de Guatemala, Champerico, or Ocos. Sailing vessels occasionally come to these last-named ports, now and then around the Horn and more frequently from the Pacific States, but the principal means of transportation are the steamers of the Pacific Mail Steamship Company, running from New York and from San Francisco via the Isthmus, and those of the North American Navigation Company, plying between San Francisco and Panama.

All goods shipped to this country are invariably roughly handled, and those which come in boxes and barrels are generally received in bad order. Flour, wheat, and barley in gunny bags, and paper in battened bales come in good order. Felt hats in one-fourth and one-half inch board boxes arrive broken and pilfered, the cases being too frail to stand handling. A consignment of expensive silk lamp shades shipped in pasteboard boxes, badly crated, instead of being packed in a waterproof box, lately arrived. They were, of course, unsalable, the boxes having been torn and the shades badly soiled.

Freight shipped from San Francisco usually arrives in good condition, though it suffers at times from transshipment to coasting steamers at Acapulco. Merchandise shipped via the Isthmus of Panama is disembarked at Colon, where the vessels discharge at wharves; thence it is conveyed by rail to Panama; thence by lighter to steamer; and thence up the west coast of Central America.

LANDING AND WAREHOUSING.

As will be noticed, freight coming via Panama has to be handled four times en route, and on its arrival at the port of entry in Guatemala is again discharged from the ship into lighters of about 20 tons capacity and conveyed to iron piers which extend 1,200 and 1,300 feet into the road. In discharging from the ship into the lighter it is often difficult to avoid more or less breakage, on account of the motion of the lighters alongside the steamers. Different kinds of freight are slung in the same sling, machinery and other heavy pieces often being lowered on top of frail packages and glass. Arriving at the pier, the freight is hoisted some 20 or 25 feet, placed on flat cars and run into the custom-house, and there weighed and stored temporarily.

At the port of Livingston vessels anchor about 1½ miles from the shore, and the goods are landed in lighters and delivered into the custom-house. There is no pier there.

These custom-houses are good warehouses and are used to store all goods save machinery, galvanized-iron roofing, oils, and lumber, which are allowed to lie on the wharves or shore while awaiting reshipment. At Champerico it sometimes happens that more goods arrive than can be stored at once, when some suffer for lack of shelter.

EN ROUTE TO THE INTERIOR.

At Champerico and San José the goods are reshipped by rail in cars, under custom-house seal, to the distributing centers of Retalhuleu and Guatemala city, where they are examined by the customs officers and finally delivered to the importer.

At Ocos goods are shipped to the interior by ox carts, pack mules, and Indian porters. During the rainy season (from July to October) the roads are impassable for carts, and exceptionally wet weather closes the roads to all traffic.

Transportation from Livingston is the same as from Ocos, save that the first stage of the journey can be made by river steamboats.

All freight destined for points not reached by steamer or rail, or for points not known to be accessible by good cart roads, should be put up in packages of 100 or 125 pounds maximum weight, two of which make a mule's burden. The best forms are boxes about 1 by 1½ by 2 feet in size and sacks and small kegs. A cart with one yoke of oxen will carry from 1,500 to 2,000 pounds. Yzabal and Panzos are the only points reached by river steamers.

OUTSIDE PACKAGES.

The handlings to which freight is subjected are so rough that all goods should be packed with the greatest care. In France and Germany an extra charge is made for packing, which is willingly paid by the merchants here, and goods from those countries arrive in excellent condition, as indeed they do from all Europe, and in great contrast to the state in which goods are received from the United States.

Dry goods should be packed in bales solidly pressed, with waterproof covering and securely bound with iron bands. Cotton fabrics must come in 24-yard lengths (English measure). It may be stated here that the sale of American cotton goods in this country, though increasing yearly, has been retarded by the disinclination of manufacturers to put the goods up in pieces of the required length. American drills for suitings (the word "drillings" is here purposely avoided, the phrase "drills for suitings" expressing the more general use to which these goods are put here) are liked also, but the colors are too light. The drillings sent from Europe are of the darker colors preferred in these countries. It is stated that the manufacturers of the United States will not dye goods in colors to suit.

Flour and grain should be put up in gunny bags, flour usually coming in 50-pound packages, three to the bag.

Groceries should be put up in small boxes and kegs, burlapped and iron strapped, but not necessarily waterproof. The packing should be such that the case may be thrown 5 feet without damage.

Wines and liquors should be packed in cases of twelve bottles, iron strapped together in bundles of two and, in the case of fine wines especially, covered with canvas. The contents should be shown by number rather than by the name of the wine, as these packages are continually subject to pilfering, both at the port of shipment, en route, and upon arrival.

Turpentine and oils should be shipped in iron drums and barrels. Kerosene should be shipped in iron drums or in 1-inch board boxes containing two 5-gallon tins packed in sawdust. When the tins are packed without sawdust they sometimes arrive in very bad condition. The boxes must be kept dry, as the tins are easily corroded by water.

Iron manufactures in large, heavy pieces, such as boilers, engine plates, and strong castings, can come loose, but light castings, gear wheels, pulleys, and delicate pieces of machinery should be crated or boxed, with all "loose-piece movement" prevented. It is most important that heavy pieces should have their weight marked plainly upon them, as the transportation companies in these countries have no means of weighing them and accident may follow the miscalculation of the weights. European houses usually send a list of weights as well, referring to each piece by number.

American hardware is much liked here, but the way it is packed is a source of great annoyance and loss to the importer. Hardware liable to be injured by water should be put up in waterproof cases. Butts, locks, files, small tools, and goods of their kind, which are usually packed in pasteboard boxes, would come much better in strong manilla paper, securely tied, and if in paper boxes, these should be so wrapped and tied. An American merchant states that he has done business with a firm in New York for many years, and that, despite repeated requests for proper packing, they continue to send him goods of this kind in the original pasteboard packages, which break en route, badly mixing the contents. Another old merchant, retired some years since, had his instructions about packing so continually disregarded that he became accustomed to state in his orders that if, upon arrival, the goods were found not to have been packed as ordered, they would be sold for account of the shipper.

Furniture should be "knocked down," wrapped in burlap, and lightly but securely crated. When upholstered, it should be put in waterproof cases.

Looking-glasses should be taken out of their frames and packed separately in stout boxes. The glasses should have paper pasted across them and be protected against jars by substantial padding.

Light lumber, well seasoned, should be used for cases. Wire nails are better than cut nails, as the latter are apt to break under continued rough handling. The green lumber commonly used in the United States for boxing will not hold nails. The cases should invariably be made to fit the goods.

DUTIES ON PACKAGES.

The customs duties on most articles are charged on the gross weight, and this in many cases nearly doubles the cost of the goods. The risk of breakage in transit from lack of strong casing and the reduction of duties by lessening the weight of these are two irreconcilable factors in the trade with this country.

INVOICES AND BILLS OF LADING.

Invoices should be made out in duplicate, giving the number of packages, marks, numbers, gross and nét weights, and measurements of each package, and expressing all charges. Many invoices are badly made out, stating so many packages of number so and so, referring to some private number of the firm by which goods are known, the name of the article not being given. The original invoice must be accompanied by a consular invoice in Spanish, well written, translated with great care from the original, and certified by the Guatemalan consul at the port of shipment.

Bills of lading should express the marks and the number and kind of packages, the kind of goods, and the rate or different rates of freight charged thereon. The numbers given in American bills of lading do not always correspond to the numbers borne by the packages, and it is sometimes difficult to determine the rates of freight charged therein on different kinds of goods.

When American exporters learn how to pack and consign goods properly to the Spanish-American countries, as do European houses which have made a special study of these matters, then, and not until then, will they be able to command their share of the Latin-American trade; but the merchants here believe that this will not be the case until the United States have to depend upon their export trade, as does Europe.

AMERICAN VS. EUROPEAN CREDITS.

In conclusion, attention may be called to another most cogent reason for the failure of American manufacturers and exporters to secure a larger proportion of this trade. The credits given in Europe are for much longer terms than those allowed in the United States. The wholesale merchants of this capital who supply the interior trade of the country are compelled to give long credits; so they in their turn have to seek the long credits of Europe. And credit here would seem to be well deserved, as failures in business are all but unknown. The present financial crisis, which has wrought so many failures throughout the world, has had no apparent effect here. The commercial agencies at home might greatly enlarge their usefulness to their patrons and further the interests of American trade in this country by sending an agent here.

ACKNOWLEDGMENT.

I desire to acknowledge the assistance of the consular agents at the four ports of Guatemala, each of whom rendered a separate report upon the subject under consideration; the courtesy of Messrs. A. Zadik & Co., of this city, to whom I am indebted for much data; and the criticisms of the factor of the Agency Company at San José de Guatemala and of two private gentlemen of this city.

HENRY C. STUART,
Consul-General.

GUATEMALA, *October 13, 1893.*

HONDURAS.

TEGUCIGALPA.

EN ROUTE FROM THE UNITED STATES.

Goods reach this consular district from the United States via Amapala, in the Bay of Fonseca. They are landed by lighters, and all kinds of packages, such as bales, boxes, kegs, barrels, sacks, or bags, pay $2 in Honduras money ($1.06 American) per ton lighterage.

WAREHOUSES.

Warehouses are provided by the Government, and it is very rare that goods get spoiled by rain—at least at Amapala.

EN ROUTE TO THE INTERIOR.

Goods, after paying duty, are shipped by lighters to La Brea and San Lorenzo, on the mainland, and from these ports they are forwarded to the city of Tegucigalpa on mules and by carts drawn by oxen.

Packages to be loaded on mules should not weigh more than 125 pounds each, and be from 1 to 1½ yards long, 1 yard wide, and three-fourths of a yard high.

DUTIES AND PACKING.

Custom duties are charged on gross weight.

The best material for outside covering is tarpaulin for bales of dry goods, and the bales should be waterproof.

Silk, linen, and fine woolen goods should be packed in tin-lined boxes.

The best way to pack kerosene is in tins of 5 gallons in cases of three tins, the cases to be secured with iron straps, and between each tin there ought to be a thin wooden partition, with a little sawdust at the bottom and top.

Groceries ought to be packed in small boxes weighing about 64 pounds gross weight.

California wines and spirits should be in barrels containing 12 gallons each.

Iron manufactures should be packed in boxes and barrels to weigh not more than 125 pounds gross weight.

Mining machinery should be shipped in sections.

Hardware should be packed in boxes.

GEO. BERNHARD,
Vice-Consul.

TEGUCIGALPA, *September 7, 1893.*

BRITISH HONDURAS.

BELIZE.

EN ROUTE FROM THE UNITED STATES.

Merchandise from the United States for this consular district is shipped at the ports of New York and New Orleans. The principal imports from the latter place are provisions and groceries, with a certain proportion of other articles, while from the former they are of a more assorted and general character. Goods shipped from New York arrive by the Central American Steamship line, and, judging from the state in which many packages are landed, they receive a good deal of rough handling. This is in part due to the fact that the vessels of this line call at other ports en route—at Jamaica, W. I., and sometimes at Greytown, Nicaragua, and other points along the coast—and consequently the cargo has to be shifted around. To my mind, however, this is not the sole cause of the dilapidated condition of the packages on their arrival here. Want of judgment on the part of shippers contributes very frequently thereto in no small degree. I have seen cases arrive broken which were of far too light a material for the heavy weights packed in them, and, on the other hand, some much lighter goods have been received in cases which were of an unnecessary thickness of board. The goods coming from New Orleans by the Macheca line of steamers—

with whose owners the local government here have a contract for a weekly mail service—are landed in much better condition, as a general rule, owing doubtless to the fact that the journey is a short one and that this is the first port of call. This port (Belize) is practically the only one in this colony, for, though three others are legally ports of entry; there is but little direct shipping to them.

UNLOADING AND LANDING.

Goods are landed in lighters from the vessels' sides, as the bar of the river, at the southern mouth of which the city is built, prevents the passage of vessels drawing more than 3 feet. Efforts have been made in the past by the government of this colony to remedy this by dredging out a channel so that vessels of deeper draft might come alongside the wharves of the city, but thus far they have not been crowned with success, owing principally to mismanagement, and also, perhaps, to the large quantity of alluvial deposits brought down by the river at flood time.

WAREHOUSING.

When goods are brought ashore, they are supposed to be landed at the government wharf, which is covered with a large iron shed, where they are safe from the elements; but when, as often happens, three or more vessels arrive at the same time, the accommodation afforded by the covered wharf is inadequate. Then recourse is had to an open wharf, to the great detriment of the goods and to the discomfort of those whose duty it is to receive them. Some time since the government addressed a circular to shippers on the subject of increased shed accommodations, but I have not yet learned what steps, if any, it is intended to take.

EN ROUTE TO THE INTERIOR.

The trade with the interior is of the most meager description. A small amount of trade is done with Peten, in Guatemala, and the goods exported to that place are sent on pack mules. The purchasers from that town are not wealthy, and nothing would be gained by putting up packages specially for their trade.

Within the colony the principal goods subjected to inland transport are salt meats, canned provisions, flour, and groceries for the use of the various gangs of mahogany and logwood cutters. The packages in which these goods at present come can not be improved. These goods are conveyed by river in pitpans and dories—species of dugout peculiar to the country. Most of the towns of the colony are situated on or near the coast and are accessible to small schooners. The only towns of any size at any distance from the sea are Orange Walk and San Estavan, on the New River (a navigable stream), and these are reached by a small American stern-wheel steamer making weekly trips from Belize.

No special-sized packages are suggested to shippers, except that prints might be put up in bales of, say, 1,000, instead of 2,000, yards, as is at present the custom; but this might be readily arranged by individual shippers. One firm complained that American manufacturers put up their own assortment of printed goods, say ten patterns to an assortment, and, in order to secure the two or three patterns suitable for this market, the whole assortment has to be taken. They urge that greater freedom of choice is given them by English manufacturers, who send patterns of their goods and allow the purchaser to make his own selection, both of patterns and number of pieces of each, and they can thus avoid having on their hands a number of pieces of goods finding little or no sale. The same firm told me that they had written repeatedly on this point; but no notice had been taken of their request, and in consequence they had ceased to order printed goods from America, preferring a poor assortment from England to running the chance of a possible loss through dead stock. This point might readily be conceded by American manufacturers, more especially as it will lead to their doing more business, not only here, but in other ports in the tropics. All the shippers interviewed are unanimous in their praise of the attractive manner in which American goods are generally put up. Too much praise can not be given by them to the way in which hardware is put up, both on account of the attractive and neat packages and the convenient quantities in which tools and similar articles arrive.

OUTSIDE PACKAGES.

The ordinary packages in use at present are quite satisfactory and can not be bettered. All baled goods should be compressed to the smallest possible space to minimize freight charges. Some shippers suggest that iron bands should be passed around all bales, as is done by English manufacturers, but this is not insisted on. They are unanimous in the opinion that all packages of dry goods should be lined with some waterproof material. In the case of bales, oiled canvas is recommended, and cases should have a lining of either oiled paper or tin. They claim that though this might at first entail a slightly increased cost, yet it would be more than counterbalanced by the greater satisfaction both the shipper and purchaser would have in the goods being certain to come to hand in the best condition possible. They deprecate the use of slats to bind several cases of tinned provisions together, giving as the reason for their objection that frequently, through carelessness, the tins inside the boxes suffer damage from the nails used to fasten the slats.

DUTIES ON PACKAGES.

Customs duties are charged on packages of goods subject to ad valorem duty. The following is a copy of the customs tariff now in force:

SCHEDULE A.

Table of customs duties.

Bacon and hams	per pound	$0.02
Beef and pork	per barrel of 200 pounds	.50
Beer, porter, cider, and perry	per gallon	.25

Butter	per pound	$0.03
Candles:		
Tallow	do.	.01
All other	do.	.02
Cheese	do.	.02
Cigars	per 1,000	9.00
Cigarettes	do.	.75
Cocoa	per pound	.02
Coffee	do	.02
Flour	per barrel of 196 pounds	.25
Gunpowder	per pound	.05
Hay and oats	per 100 pounds	.10
Lard	per pound	.01
Lumber:		
Rough, except palings	per 1,000 feet	1.00
Dressed, except palings	do.	1.50
Oils:		
Mineral	per gallon	.03
Other kinds not in bottles	do.	.06
Opium	per pound	2.00
Revolvers	each	3.00
Rifles	do.	1.75
Soap	per 100 pounds	.50
Spirits, cordials, and liqueurs not exceeding the strength of proof by Sikes's hydrometer, and in proportion for any greater strength than strength of proof	per gallon	2.50
Spirits, methylated	do.	1.00
Sugar	per pound	.03
Tea	do.	.12½
Tobacco	do.	.15
Cut	do.	.50
Wines:		
Sparkling	per gallon	1.50
Still	do.	1.00
Confectionery, jewelry, plate, and perfumery (according to the invoice or assessed value, including the packages)		15 per cent.
All other goods, not free of duty, and not otherwise charged with any duty (according to invoice or assessed value, including the cost of the packages)		10 per cent.

SCHEDULE B.

Goods free of duty.

Agricultural implements.
Animals, living.
Books, printed (not being account).
Bread, navy and pilot.
Bricks, roofing slates, and tiles.
Bullion and coin.
Cane bills, cane knives, and hoes.
Cement and lime.
Church decorations and vestments imported specially for any church.
Coal and coke.
Drain pipes.
Firewood.
Fish, salted (dry or wet).

Fresh fish and oysters (not preserved in any way).
Fresh fruit (except bananas, cocoanuts, and plantains).
Hides, raw.
Ice.
Indian corn.
Iron:
  Fencing, including staples and railings.
  Framework and girders for iron buildings.
  Roofing (including down pipes, gutterings, ridging, and screws).
Machinery (agricultural, marine, and manufacturing).
Maps and charts.
Meat, fresh (not preserved in any way).
Palings for fences.
Passengers' luggage (containing apparel and articles of personal use and professional apparatus).
Patterns and samples of no salable value.
Pitch and tar.
Plants, seeds, bulbs, and roots.
Plant or materials for railways, tramways, electric lighting, telegraphs, or telephones.
Poultry and other live birds.
Pumps and other apparatus for raising water.
Rice.
Rubber, unmanufactured.
Salt (other than table salt).
School appliances imported specially by the manager of any school.
Shooks, staves, heads, and hoops for casks and rum casks.
Stones, sand, gravel, and soil.
Tanks or vats.
Timber, logwood, and other dyewoods, being indigenous to the colony.
Tombstones and memorial tablets.
Tortoise shell, unmanufactured.
Trucks for use in mahogany works (including the axles, iron work, and chains forming parts thereof).
Turtle, live.
Uniforms and appointments imported by civil officers.
Vegetables, fresh.
Vessels.

SCHEDULE C.

Excise duty.

Spirits and strong waters manufactured in the colony, not exceeding the strength of proof by Sikes's hydrometer and in proportion for any greater strength than strength of proof..........per proof gallon... $1.25

Storage of gunpowder.

On each barrel of 100 pounds..........per month or for a fractional part thereof... $0.25
Smaller packages in proportion.

SCHEDULE G.

Warehouse rent on all goods lodged in the Queen's warehouse per month or any part of a month, so long as the goods remain in the warehouse.

For every puncheon, pipe, butt, or tierce..........per month... $0.50
For every hogshead or half tierce..........do...... .25

For every quarter cask	per month	$0.18¾
For every octave	do	.12½
For every barrel	do	.12½
For every half barrel	do	.06¼
For every demijohn	do	.06¼
For every bag of salt of 100 pounds	do	.25
For all packages measuring less than 1½ cubic feet	do	.02
For all packages measuring 1½ and less than 2½ cubic feet	do	.03⅛
For all packages measuring 2½ and less than 5 cubic feet	do	.06¼
For all packages measuring 5 and less than 10 cubic feet	do	.12½
For all packages measuring 10 and less than 20 cubic feet	do	.25
For all packages measuring over 20 cubic feet	do	1.00

Port charges—light dues.

On all vessels of 5 tons and upwards, entering from seaward	per registered ton	$0.12½

BELIZE, *December 15, 1892.*

The importers do not advise any change in the packages used on the score of avoiding duty, as it is not excessive, and they would rather receive their merchandise in good shape, though it might entail a trifling additional cost, than suffer possible loss through insufficient packing.

JAMES LEITCH,
Consul.

BELIZE, *August 25, 1893.*

NICARAGUA.

BLUEFIELDS.

EN ROUTE FROM THE UNITED STATES.

American goods reach this port from New York via New Orleans and from New Orleans direct in steamships plying between the United States and Central America, without any handling other than that necessary at the ports of shipment and destination.

UNLOADING AND LANDING.

Goods are landed usually on the wharf of the "municipal government's bonded warehouse," located at the entrance to the harbor, about 6 miles from the town of Bluefields. Sometimes, however, they are taken directly from the steamers into lighters, and thence to Bluefields.

WAREHOUSING.

A warehouse is provided at the steamship landing place, where the goods are first deposited, and there they remain in security until removed by lighters. On the lighters they are covered with tarpaulins, so that they are but little exposed to the elements.

EN ROUTE TO THE INTERIOR.

Goods are not shipped to the interior from this port. They are supplied to storekeepers along the coast, and to miners, banana-planters, and rubber-cutters by way of the rivers in small boats called dories, propelled by paddles.

OUTSIDE PACKAGES.

Wooden boxes lined with tar paper or waterproof oiled linen are best for outside packages. Small-sized boxes are preferable here, because they are more easily packed in the small boats or dories. Flour should be put up in half or quarter barrels, because it facilitates handling en route and in camp, where most of it is consumed.

DUTIES ON PACKAGES.

No duties are charged on boxes or packages.

B. B. SEAT,
Consular Agent.

BLUEFIELDS, *September 2, 1893.*

SAN JUAN DEL NORTE.

EN ROUTE FROM THE UNITED STATES.

American goods reach Greytown, as well as Bluefields, by steamers from New York or New Orleans without being handled en route. The steamers have to anchor in roadsteads, of which the one of San Juan del Norte (Greytown) is entirely unprotected and during a part of the year is very rough.

To defray annual municipal expenses, a commercial contribution is raised in the city of Greytown and divided pro rata among the merchants, according to their importations. The mode of distributing this contribution is regulated by a decree of the supreme Government issued on the 7th day of March, 1882. The sum expended for the maintenance of the city and port of Greytown is not less than 30,000 pesos (1 peso=53.1 cents).

LANDING AND WAREHOUSING.

The discharging on lighters, often during the heavy tropical rains, subjects the merchandise to a great deal of exposure, which can only be protected against by tarpaulins. The warehouses at both ports are spacious enough. As the packing of American goods—especially of dry goods—is very defective and careless, these goods arrive at the warehouse very often in a deplorable condition and the agencies are constantly settling claims, causing losses to the steamships and insurance companies.

EN ROUTE TO THE INTERIOR.

The goods from San Juan del Norte are shipped to the interior by the river steamers of the Nicaragua Mail Steam Navigation and Trading Company on the San Juan River and across Lake Nicaragua, this being the only communication from the whole Atlantic coast with the more populous interior. On account of the four rapids along the river, and because of the lack of water during the dry season in the lower part of the river, the goods have to be transferred many times and have sometimes to be lightered over the rapids.

At Castillo, 85¾ miles from the free port of Greytown, is the Nicaraguan custom-house, where everything is examined, and some goods taken out of their respective balings, for taxation. This manipulation is, of course, very injurious to the goods.

From San Carlos, San Mighelitto, and San Ubaldo, steamship stations on the east side of the lake, many goods—especially provisions, flour, canned goods, tools, fence wire, and nails—are transported to the great cattle ranches and to the gold mines in Chontales on mule back. Packages in this case should not exceed 100 pounds in weight.

Dry goods ought to be well pressed and the interor of the bales covered with oilcloth to preserve the contents from damage by rain. It is very desirable that all goods should be packed in strong cases, bales, or barrels and made perfectly secure, as their handling is rough.

There is a great import of American kerosene into this Republic, the packing of which is very defective. The leakage causes damage to other merchandise and involves, too, a great danger.

OUTSIDE PACKAGES.

The following suggestions concerning packing are offered:

Dry goods.—Fine goods like silks, velvets, laces, embroideries, ribbons, millinery, etc., should be packed in zinc-lined cases, after the manner of similar English goods. Solid cases, not too heavy, put together with wire nails, should be used. Cotton, cloth, etc., should be packed in good oilcloth waterproof wrappers, with iron hoops or wire around the bales.

Groceries.—Flour should be sent in half-quarter barrels only—the barrels of a good make and carefully closed; lard in usual form, but in smaller cases, strapped with iron.

Drugs are satisfactorily packed.

Liquids.—No complaints are made by the merchants about the packing of liquids, save as before mentioned in regard to kerosene.

The packing of hardware, iron manufactures, and tobacco is also satisfactory.

Furniture.—This generally arrives in packages too large and in unsatisfactory crates or cases. More care is taken with pianos and organs.

The packing of kerosene deserves the most attention, as it damages other merchandise and offers so many chances for great disasters. Smaller tins and better nailed boxes are recommended.

S. C. BRAIDA,
Consul.

SAN JUAN DEL NORTE, *September 20, 1893.*

SALVADOR.

SAN SALVADOR.

UNLOADING AND LANDING.

The more or less bad condition in which goods reach this country is largely due to the usage to which packages are subjected on landing at the ports and during their transportation from the ports to the interior. The knowledge, then, of the facts concerning the landing and transportation difficulties in Salvador is bound to be a sure guide to manufacturers and exporters intending to pack goods destined for this country.

In the first place, goods are hoisted from the holds of vessels in a rough and careless manner and thrown down into lighters or big open launches, where they are as roughly put in order, with utter disregard to the size or resistance of frail packages, on which heavy ones are piled, to the detriment of their contents.

Once loaded, the lighters are rowed a distance of from half a mile to 2 miles (at Acajutla and La Libertad) to the wharf, where the goods are again hoisted some 30 or 40 feet from the launches to the pier, in a somewhat similar fashion to that observed in unloading them from the steamers. From the head of the pier the cargo is once more moved, placed on small platform cars, pushed some 400 feet over rails by hand at La Libertad, and drawn by oxen at Acajutla, to the custom-house, where warehouses are provided pending the registering of merchandise.

At La Union the process just described varies a little with regard to the pier. There the lighters, which are long and narrow Indian canoes or "bougos," as they are called, are supposed to reach the land directly from the steamers; but, as the water is too shallow for their draft, ox carts are driven up to the axles into the muddy water, and the bales, cases, barrels, etc., are brought to them from the boats on the shoulders of cartmen and boatmen, who wade waist deep from 10 to 25 yards. The carts, once loaded, are driven some sixty yards to the custom-house, where the goods are thrown out and stowed pending registration.

EN ROUTE TO THE INTERIOR.

At Acajutla the cargo is taken from the warehouse, on board the cars of the Acajutla Railroad, to Sonsonate or to the terminus at La Ceiba. Goods are supposed to suffer a great deal less from rough handling by this route than on the way from La Libertad or La Union to the interior. The transportation from Sonsonate and other railway stations to the western departments of Salvador and from the two seaports mentioned above to the inland towns is done by means of carts. These are two-wheeled vehicles drawn by oxen. Their construction is primitive and strong. Their axles are made of wood, and the body of the cart sits directly on the axle, without any springs.

The length of the carts is generally 9 feet and the breadth 3½ feet. In the dry season, when the roads are supposed to be in good condition, they carry as much as 7 "cargas" of 12 "arrobas" each (2,100 pounds). This load is reduced to 1,000 and even to 800 pounds in rainy weather, when the roads are next to impassable. One hundred and twenty-five cubic feet of bulky and light cargoes can be transported in one of these carts.

The roads in Salvador are, as a rule, very bad. They are not macadamized, and can be described as simple cuts on the hillsides of sufficient width to allow two carts to pass each other. Whenever traffic or a rain storm wears holes or ditches in the roadbed, bundles of twigs or brush and loose earth brought from the nearest cut on the roadside and placed therein are deemed enough by the municipal officials to remedy the imperfection; the consequence is that the highways are always in poor condition. To this it may be added that bridges are extremely rare; that the ground is generally soft, easily cut by the rain, and frequently muddy; that no regard has been taken for the grading of the ways, which go almost straight uphill and down to the bottom of the valleys; and, lastly, that the rainfall in the wet season is frequent and heavy.

Whenever an axle breaks, which is a very common occurrence, or whenever, as more usually happens, a cart gets stuck in a mud hole, out of which the oxen—small, ill fed, lean, and weak beasts—can not pull it, the custom on the road from La Union to San Miguel is to unload the cargo and to carry it on the shoulders of the cartmen beyond the difficult pass, in order to draw the empty vehicle to a safe place, where they load again, only to repeat the sticking and unloading process some 2 or 3 miles ahead. On the La Libertad road a whole train of carts stops at such times and unite the strength of ten or twelve couples of oxen to draw the "stuck cart" over the bad piece of road. Then they move away, leaving others to meet their fate, without ever giving a thought to mending the ditch or hole that detained them. In this way they manage to make the distance of 36 miles from La Libertad to San Salvador or from La Union to San Miguel in from three to eight days.

The price for carting every "carga" of 300 pounds a distance of 36 or 40 miles varies from 95 cents to $4.50, according to the season of the year. Goods are carted in the same manner from Sonsonate to Santa Ana, and from the railway terminus at La Ceiba to Santa Fecla and San Salvador.

Once at Santa Ana or at San Miguel, a new kind of handling begins for packages destined to go further into the interior. This consists in pack mules that carry from 200 to 250 pounds, and which differ very little from those used on the Rocky Mountains.

OUTSIDE PACKAGES.

From what has been said, it is only natural to suggest that goods should be tightly packed in as small cases, bales, barrels, or packages as possible—no larger than 36 by 20 by 18 inches, and weighing not more than 80 or 100 pounds.

Cases containing goods should be made of strong three-quarter inch boards, capable of standing more rough handling than any that can be even imagined in the United States, for in this country the mere movement of a cart on a relatively smooth road is enough to shake almost any kind of a box to pieces and to ruin the contents if not firmly packed and well protected with sawdust, hay, or other appropriate packing stuff. This should especially be borne in mind when packing bottled wines, liquors, and other liquids, which, by the way, are frequently rifled in a strange and very effective manner. The cartmen willfully strike the bottom of a whole case of wine or brandy against a rock until the board gets broken and with it one or more bottles. The liquid then pouring out through the box or package is collected and drunk. This is reported and charged to the broken case from which no bottle has been extracted.

Against heavy packing, however, there is the drawback of customs duties charged on the box, keg, barrel, etc., according to the actual tariff. Merchants generally sell the cases or packing of merchandise for more than the equivalent of the duties paid on them. The question then is, does it suit them better to pay small duties on a light case and run the risk of heavy losses by breakage and robbery or to pay more duties on strong boxing, with a prospective guaranty against either loss? The latter is generally accepted as preferable.

The actual system of packing bales of dry goods is good enough, but the weight per package ought to be diminished by putting fewer pieces of cloth in each.

The fact of packages not being waterproof increases the freight rates about 15 per cent from the ports to the interior during the rainy season.

Casks containing wines or other liquids should be protected by a thick, coarse mat, covering at least the central or widest diameter of the same.

Petroleum, naphtha, cotton-seed oil, and similar articles should be packed in cans of thicker tin, and the soldering should be more carefully executed, for they suffer a great deal in transit, and the leakage, of the first especially, often amounts to 40 per cent of the whole invoice.

All wooden cases and boxes should have, when possible, iron bands on the edges, and some device ought to be invented by which the ends of those bands may be locked and unlocked in some way as a precaution against stealing the contents by boatmen, cartmen, and porters, particularly when high-priced goods are packed in them. Custom-house officials open all packages to register their contents and deliver them opened to the owners or their agents, who shut them hastily as best they can and turn them over half closed to the cartmen to be taken to the interior in the manner already described.

Machinery destined for this country should be made in as small pieces as practicable. The road from La Union to San Miguel is strewn with heavy pieces of mining machinery, big iron shafts, blocks of granite and marble for monuments, etc., which have never reached their destination. At this date there is actually a boiler at the foot of the pier at Acajutla under 12 feet of water, which broke the chains with which they were hoisting it from the lighter. It is sunk, probably never to be recovered.

In conclusion, our merchants should remember that English is not spoken in Salvador, and that the labels "handle with care," "this side up," "use no hooks," etc., on packages should be written or printed in Spanish if they are to be read here.

G. J. DAWSON,
Vice-Consul.

SAN SALVADOR, *August 26, 1893.*

SOUTH AMERICA.

ARGENTINE REPUBLIC.

INTRODUCTORY REMARKS.

In response to the circular of the 7th of July, I may premise that it relates to a subject to which I have already on various occasions called the attention of manufacturers and others shipping merchandise to the Argentine Republic. As long ago as 1878 in one of my reports I referred to the matter as follows:

> Shippers in the United States must pay more attention to the preparation of their articles for shipment and to their packing. The latter in many cases is especially defective and careless. It seems to be assumed that the same manner of boxing which will answer for sending goods by rail from one part of the United States to another will answer for their shipment to the River Plate. They must remember that it is a long voyage, over sometimes very rough seas and across the heats of the equatorial regions. My attention was recently called to a shipment of felt hats, which, when opened, were found to be entirely ruined. They had been packed without having been properly dried after their manufacture, and they were spoiled by the moisture left in them. I had occasion recently to examine a shipment of hatchets and hammers with their handles attached sent out from New York and received in such bad condition as to be unsalable. The wood of which the handles were made had not been sufficiently kiln-dried, and the sap which was in them not only blackened them beyond recovery but ruined the steel with rust. A magnificent grand piano, of a celebrated American manufacture, was received here a short time ago with the strings most shamefully rusted. The shippers had, by some carelessness or oversight, omitted to line the box in which it was shipped with a tin lining. A cargo of crushed sugar which was shipped from the manufactory while still retaining moisture, or which was rained on while in transit to the vessel, was received here recently with the contents partially melted away and the barrels black with the steaming they had received. These are only a few instances out of many which have come under my notice since I have been stationed here. In the matter of preparing and boxing articles for export, the Americans could learn a lesson from the English and the French, who, from long experience, have reduced this very important part of the business of exporting to a science.

Having had, since the foregoing was written, manifold occasions to remark the effects in damaged and unmerchantable cargoes of bad packing or of goods shipped in improper condition, I have referred to these matters time and again in my reports. The circular of the Department would indicate that at last our manufacturers and shippers begin to understand that they are standing in their own light in paying so little attention to this most important matter.

EN ROUTE FROM THE UNITED STATES.

The great bulk of the merchandise exported from the United States for the Argentine Republic has heretofore come by sailing vessels, though of late two lines of direct steamers have been established, which are now getting into regular work. Heavy cargoes, such as lumber, kerosene, and agricultural machinery, are still brought for the most part in sailing ships, but if these steamers succeed in establishing themselves, shippers of these and of all general cargo will find it to their advantage to employ steam conveyance. The handling and usage which the goods receive en route, if by direct steamer, depend on the storage of the cargo when loading. If the cargo is so stowed that the merchandise for the respective ports of call comes to hand in proper rotation, the disturbance of goods destined for subsequent ports is to a great extent avoided. In the case of sailing vessels, as these come to a direct port, the cargo is not touched or handled until in course of discharge.

Besides this direct route, however, there are shippers in New York who send goods to the River Plate by steamers which come down the coast no further than Rio de Janeiro, from which port they are reshipped by other lines to Buenos Ayres. There are other shippers who send their merchandise from New York by steamers of the North German Lloyd via Bremen or some other German port, or by the Lamport and Holt Line via Liverpool or Southampton. In these cases the goods have to be handled at the intermediate port for the purposes of transshipment, but in German and English ports such handling is generally done with ordinary care. In Rio de Janeiro, however, there has always been great carelessness displayed, as lighters have to be employed to effect the transfer.

LANDING.

Heretofore at the port of Buenos Ayres all cargoes had to be discharged by lighters, the vessels lying several miles out in the River Plate; and storms, squalls, high winds, and rough seas sometimes partially ruined merchandise before it reached the shore. Since the deepening of the Riachuelo port and the opening to traffic of such docks of the Buenos Ayres port works as have been completed, nearly all vessels, sailing craft as well as steamers, discharge alongside of wharves, where all the modern appliances for handling cargoes are to be found. The only exception to this rule is in the case of vessels arriving from infected ports, which, if they do not care to run out their allotted quarantine, are at liberty to discharge their cargoes in the outer roads into lighters, which subsequently deliver their freight either in the docks or on the wharves of the Riachuelo. Lighters are occasionally employed when a vessel or a steamer arrives with a draft that precludes her entering the "Boca" or the docks.

WAREHOUSING.

There is fair bonded-warehouse accommodation along the docks, and when vessels are discharged in the city port there are generally to be found Government warehouses immediately at their side, in which the merchandise at once finds shelter. Sometimes, however, if there happens to be a great rush of importation, the accommodation is found to be inadequate, and vessels have to wait their turn for a berth. This, however, does not, as a rule, affect sailing ships, which generally discharge in the Riachuelo, where there is always wharf room—the vessels sometimes lying two or three deep—and the goods pass straight to the consignees, having been previously dispatched at the custom-house. In these transfers it may happen that goods are exposed temporarily to the elements and suffer damage; though in these cases, as good tarpaulins are always at hand, if they do suffer damage, it is through want of care on the part of the consignees. Such goods as have not yet satisfied the customs dues are taken from the Riachuelo wharves in carts to the bonded warehouses in the immediate neighborhood.

EN ROUTE TO THE INTERIOR.

The principal ports of entry for ocean-going craft are Buenos Ayres, on the La Plata River, and Rosario, on the Paraná; and shipments from other countries are invariably made directly to consignees in those cities. The trade with the interior is conducted exclusively through these importing houses, which make up packages, cases, etc., in the matter of length, width, weight, etc., to correspond to the requirements of the medium of interior transportation. These means of transportation consist of river steamers, railway cars, and bullock carts or wagons. Since the late wonderful development of the railway system of the Argentine Republic, the transport of goods by mules or pack horses may be considered as almost a thing of the past, as there are now only a few districts, in certain parts of the more distant mountainous provinces, where this mode of carriage is required. To-day, there are few places out of touch with the large fleet of river steamboats or of some railway system. And, should at any time consignments of goods be made direct to far interior districts, it would hardly be worth while to modify ordinary packing sizes to meet such a doubtful contingency as transportation by pack mules or horses. I may further state that as all this part of the Argentine Republic is a "pampa," or prairie, country, there is no great jolting to be encountered or rehandling to be employed.

OUTSIDE PACKAGES.

Dry goods.—Textile fabrics and dry goods generally should come in cases of pine 2 inches at least in thickness, securely put together with wrought nails and firmly secured with two or three iron bands around the boxes. The interior should be lined with oil sheet or patent paper next the wood, and then good, strong brown paper inside of that. Duck should come in bales, first wrapped in oiled cloth, then wrapped in strong paper, and the whole inclosed in stout canvas.

Groceries.—Groceries in packages should be treated very much as textiles. If in bottles, they should be packed in sawdust. For such goods the English shippers generally use cases divided into compartments. The slight divisions in such cases prevent the bottles from coming in contact with each other. Where such cases are not used each bottle has a hood of twisted straw. In the case of canned goods, sawdust is sufficient. Hams and bacon, always securely canvased, should be put into barrels impervious to water or moisture. Pork should be put, with sufficient pickle, in strong barrels, with at least five hoops at each end. Lard generally is packed in 10-pound tins, and special attention should be paid to the soldering. The boxes in which these are placed should be secured by iron bands. Cheese should be cased in wooden caddies strong enough to withstand rough handling. Mackerel and other fish in the brine should come in kits or half kits, perfectly close, to guard against leakage. Sugar should be put into strong barrels, close heads, strongly hooped, and paper lined.

Liquids.—Wines, brandies, whiskies, fermented liquors, vinegar, etc., if bottled, each bottle should be thoroughly protected by hoods of twisted straw, and the cases should be strong and bound at the ends with iron hoops. If in barrels, the barrels should be thoroughly seasoned, iron hooped, and of sufficient resistance to withstand the close packing and working in the hold of a vessel. Wine barrels should have the ends carefully protected by Roman cement. Liquor dealers, however, sufficiently understand the absurdity of shipping in cooperage which can not stand a sea voyage.

Petroleum and kerosene and other illuminating oils, which constitute the leading articles of importation from the United States, should be carefully put up in 5-gallon tins and thoroughly soldered; and these tins should be tightly packed, two in a case, in substantial, well-made boxes. The trouble with shipments of kerosene to the River Plate is that the boxes are so weak and so slovenly made that even with the best of storage in the hold of the vessel they are frequently crushed by the weight of the cargo above them. A little more expense in strengthening the boxes would greatly reduce the percentage of damage. Even under the most favorable circumstances, if there is any unusual laboring of the vessel, there is apt to be some leakage, owing to careless soldering, thus causing discoloration to the adjacent cargo.

Iron manufactures.—Polished hardware and manufactures of steel generally should be wrapped in oiled paper and stove-dried brown paper and then packed in tin-lined boxes, in order to avoid the effects of the evaporation through heat and sweat in the hold of the vessel. In the case of tools, axes, hatchets, mechanical instruments, fine agricultural implements—indeed, all articles which have handles—the handles or wooden parts should be packed separately to prevent the effects of the moisture in the imperfectly seasoned wood. Ordinary iron manufactures can be sent in the usual way established by custom. Agricultural machinery, such as planters, reapers, harvesters, thrashers, separators, etc., should be boxed in detached pieces and put together after their arrival here. This precaution not only saves breakage from rough handling, but guards against the discoloration of the wood from heat and steam in the hold. And the same method should be adopted in regard to American furniture, chairs, etc. Pianos, of course, should have tin casings within the boxes in which they are placed, and so with everything partly made of metal which will rust.

DUTIES ON PACKAGES.

The extent to which customs duties are charged on boxes and other coverings is fully and particularly set forth in the Argentine tariff. In the first article of the tariff for 1893 it is provided that "articles which pay according to their weight which have two or more coverings shall be charged only for the one which is immediately next to the article, with the exception of tea and such things as come in wooden casks, which shall pay only on the net weight." Article 7 further provides that "in the case of wines, oils, alcohol, beer, and liquors there shall be allowed a leakage of 5 per cent if they have been imported from ports to the north of the equator and of 2 per cent from ports south of the equator. A deduction of 2 per cent is also conceded to such liquids for breakage when they come bottled, no matter what ports they may have come from."

In the tariff of valuations, the following is the provision made for tare, for leakage, and for breakage:

Tare allowances in Argentina.

Articles.	Allowance.
Spirits of turpentine in tins	5 per cent for leakage.
Tar and pitch	Do.
Oil in jars, boxed	3 per cent for breakage.
Tiles and bricks, unpacked	10 per cent for breakage.
Tiles, painted, in boxes	5 per cent for breakage.
Tiles and mosaics in casks and boxes	2 per cent for breakage.
Barrels of sugar, salt, and other similar articles	10 per cent for tare.
Barrels of yerba mate, macaroni, etc	15 per cent for tare.
Bags of hair, wool, or other produce	2 per cent for tare.
Bags (double) of coffee, rice, and the like	Do.
Earthen and glass bottles	7 per cent for breakage.
Bottles filled with liquids not named in article 7	2 per cent for breakage.
Hogsheads of tobacco in the leaf	10 per cent for tare.
Iron "braseros" and pots	7 per cent for breakage.
Handles of implements and twine in bundles	4 per cent for tare and breakage.
Refined sugar in cases and boxes	14 per cent for tare.
Grease and tallow in boxes without zinc	16 per cent for tare.
Gruyère cheese in boxes (inside case)	10 per cent for tare.
Sweetmeats in boxes	25 per cent for tare.
Yerba mate in boxes	15 per cent for tare.
Earthen pipes for drainage	8 per cent for breakage.
Casks with fruits in liquor	5 per cent for leakage.
Casks with molasses	20 per cent for tare and leakage.
Casks with salt meats in brine	16 per cent for tare and leakage.
Fruits in baskets	19 per cent for tare.
Potatoes in baskets	15 per cent for tare.
Yerba mate in baskets	Do.
Preserves in tins	2 per cent for decomposition.
Glassware and glass	5 per cent for breakage.
Liquors in demijohns	4 per cent for breakage.

Tare allowances in Argentina—Continued.

Articles.	Allowance.
Pack thread and binding twine in bales	4 per cent for tare.
Wool, hair, etc., in bales	2 per cent for tare.
Galvanized iron for roofing, etc	8 per cent for tare.
Rope and rope yarn in bales	4 per cent for tare.
Tin	7 per cent for tare.
Gloves, etc	5 per cent for breakage.
Sirups in tins	2 per cent for leakage.
Oils in tins	Do.
Kerosene in tins	Do.
Yerba mate in tins	10 per cent for tare.
Black tobacco in tins	6 per cent for tare.
Cheese in tins	8 per cent for tare.
Fruits in liquor in tins	3 per cent for leakage.
Crockery and earthenware	7 per cent for breakage.
Marble, worked or unworked	5 per cent for breakage.
Pine lumber	6 per cent for breakage.
Other lumber in boards or planking	3 per cent for breakage.
Veneering	5 per cent for breakage.
Curb and paving stones	Do.
Slate roofing	15 per cent for breakage.
Slate for billiard tables and flooring	5 per cent for breakage.
Lard, grease, and mares' oil in pipes	16 per cent for tare.
Porcelain ware	5 per cent for breakage.
Cheese	2 per cent for decomposition.
Tiles	12 per cent for breakage.
Zinc in casks	6 per cent for tare.

I may add that all textile goods now pay tariff duties according to weight, which includes the wrap that is around each piece, but not the actual case or its lining. Binding twine, sail twine, and cotton duck, which come in bales, pay on the total weight, including the outside covering, and it is on this total weight that the 4 per cent tare is allowed. Turpentine in tins pays on total weight, including the tins, for which the 5 per cent for leakage is allowed. So, also, lubricating oils pay on the total weight, less 2 per cent.

I have thus specified in some detail the most suitable methods of packing the different classes of goods destined for the River Plate, and stated the customs regulations in regard to the imposition of duties on the coverings, as also the allowances made for tare, for leakage, and for breakage. For much of this information I have to express my indebtedness to P. Dorman, esq., the agent of the British Lloyds.

SAIL VS. STEAM.

If goods are sent by sailing vessels extra care must be exercised in the contingency that the vessel also carries lumber which is sappy or insufficiently seasoned, since, when passing through the hot, equatorial latitudes, it invariably sweats, filling the holds with vapor, which is apt to penetrate even the best packing and damage the interior contents. Steamers, however, do not, as a rule, carry lumber, on account of the higher rates of freight, and these are the safest carriers for general cargoes. Good, staunch sailing vessels which are loaded exclusively with general cargoes are, of course, equally suitable.

During the last year there arrived here from the southern ports of the United States cargo after cargo of hard pine, which, having been shipped in a green and sappy state, was found to be in a damaged and unmerchantable condition, thus entailing great losses upon the shippers. There is no port in the world where dealers are more critical or more exacting in the matter of lumber than Buenos Ayres, and this fact should make our shippers more careful to demand an inspection before the cargo is put on board.

UNSEAWORTHY SHIPS.

Not infrequently the vessels bringing merchandise from the United States are not dry, first-class ships, and they arrive here with their cargoes damaged by sea water, thus running up against insurance companies large expenses for surveys, forced sales, and ultimate payment of losses for the damages and injury sustained. It would seem to be to the interest of our underwriters—for, of course, the charterers are not particularly interested—to be more careful in giving classes to vessels, and especially in accepting as first class such unseaworthy ships as have managed to get a class in countries that have no cargoes to ship. Of course, American sailing vessels which have honestly secured a first-class rating can not compete with the hulks which, having been refused a class at home, have subsequently been purchased abroad, and then, having received a few repairs and a new name, are given a class, which our underwriters accept without demurrer and complacently pay for the unmerchantable cargoes they deliver.

E. L. BAKER,
Consul.

BUENOS AYRES, *October 29, 1893.*

BRAZIL.

PARA.

EN ROUTE FROM THE UNITED STATES.

All goods arrive in vessels, principally steamers. Upon arrival they are subjected to only one handling, that of unloading.

LANDING AND WAREHOUSING.

All goods are landed by lighters.

Bonded warehouses are provided for all foreign goods. The lighters used are good, covered, iron lighters, and all goods are thus protected from the elements.

EN ROUTE TO THE INTERIOR.

Goods are shipped into the interior by river steamers such as navigate our largest rivers. Pack horses are not used or required.

OUTSIDE PACKAGES AND DUTIES.

No special outside covering is required.

Customs duties are collected on most articles by gross weight; therefore, boxes and other covering should be as light as possible consistent with strength. As goods are frequently subjected to rough handling in unloading from the steamers into lighters, boxes should be strapped with iron hoops or some other material to insure strength.

The duty on kerosene and many other liquids is paid by the cubic liter.

No particular style or mode is necessary in packing goods for shipment to this port, but the goods should be put up in a neat and attractive manner.

GEO. G. MATHEWS, Jr.,
Consul.

PARA, *September 5, 1893.*

PERNAMBUCO.

EN ROUTE FROM THE UNITED STATES.

Since the American line ceased coming here American goods reach Pernambuco principally by English and German steamers, occasionally by sailing vessels. The goods are not supposed to be handled en route, unless those having charge of stowing the cargo should be careless enough to place the merchandise for the first port en route in the bottoms of the holds. If, when merchandise for the last port is thus stowed or in the ship's center, where goods for intermediate ports should alone be stowed, it will be subjected to considerable handling.

LANDING AND WAREHOUSING.

Goods are landed at this port both at wharves and in lighters, principally in lighters. Steamers of 2,500 tons or less usually anchor inside the reef or in port, as it is called, and generally discharge in lighters, though some discharge alongside the wharves. The larger steamers anchor outside the port, where they are discharged by lighters.

Goods when discharged from the lighters are placed on the street alongside, and all are taken to the custom-house, except perhaps lumber, flour, kerosene, lard, rosin, and fish, which go into warehouses. Goods which would otherwise be exposed to the elements are covered with tarpaulin. Care, however, is taken that they do not remain long exposed.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by railway, by boats up small streams and rivers, and by pack horses and mules. When it is known that the railway mileage of the entire State of Pernambuco (which is nearly as large as the State of Kansas) is not above 450 miles, it may be inferred that most of the goods to the interior are carried by pack horses or mules. Goods go by train or water to the town on railway or river nearest to the interior towns to which the goods are destined, and are thence transported by pack horses or mules to their destination. It will thus be seen that the pack horse or mule is very largely the motive power of the State.

A pack horse or mule usually carries from 60 to 80 kilograms (135 to 200 pounds) of weight. If the goods are bulky, the weight is less. The box or case in which such goods are put up is from 1½ to 2 feet in length, and from 1 to 1½ feet in depth and width, depending, of course, upon the weight, character, and bulkiness of the goods. Two cases are thus carried, one on each side of the horse or mule. The goods are securely fastened and covered with oilcloth. This point, however, is not really a matter for the manufacturers or shippers of the goods to concern themselves about, as the importer arranges his own cases or boxes here when he receives the goods, selecting from the different cases what he wishes to send to his customers in the interior and repacking them to suit the requirements. The only thing the manufacturer and shipper in the United States needs to do in the matter is to put up the goods very securely and firmly, as before stated, in good, strong boxes or cases, with wire nails, with patent clasps on corners, and well bound with iron hoops.

OUTSIDE PACKAGES.

The best outside coverings are boxes or cases made of good, sound pine of usual thickness—1 to 1½ inches.

Merchandise shipped to this country should be packed in the same manner as the same classes of goods are packed, say in New York for St. Paul, New Orleans, or any other city in the United States; but more pains should be taken in packing goods for export than those sent from one city to another in the United States. Importers here say that the cases or boxes for export should be smaller than the home cases or boxes, so that they may better stand the greater and rougher handling to which they are subjected.

All goods liable to damage from air and water should be packed in waterproof cases.

The case or box for dry goods should be made of strong pine, the boards not too thin, with strong iron hoops and patent clasps on corners. Plain wire nails should be used instead of the common iron nails. There should be paper and oilcloth inside the case or box to protect the goods. From thirty-six to forty pieces should be packed in the box or case. If the dry goods are put up in bales, there should be about twenty pieces in each bale, with oilcloth inside and iron hoops around the bale.

Groceries should be packed in strong boxes, but not so large as to render them unwieldy for handling. As in the case of dry goods, groceries are generally opened in the seaport towns and repacked in cases of such size as the importer wishes for his customers in the interior. In fact, all imports, excepting machinery and, in some cases, flour, codfish, lard, and barrels containing wine are repacked for the interior. The boxes or cases in which groceries intended for this place are shipped should be made of good, sound pine, well bound with iron hoops, using wire nails in their making. Few groceries, however, come to this port from the United States. Portugal, France, and England supply the greater portion of this class of goods. Some importers say they found hams and bacon coming direct from the United States imperfectly cured, so, while they still use American ham and bacon, they come via England. American cheese is too rich and becomes rancid too soon, it is said. French butter is preferred to the American article. Besides being of the right, bright-yellow color, it is put up in small tins, which are easily opened by tearing off the band, thus freeing the cover without the use of an opener. The French put up butter in very small tins. Flour is put up in barrels that are not sufficiently well hooped to stand the rough usage to which they are subjected, consequently a great many of the barrels may be seen with one or both heads knocked out. One firm here, however, importing flour from Baltimore have barrels made that compare very favorably with the Trieste flour barrels in durability. The export flour barrel, like every other export covering, should be much stronger than the barrel or the covering used in the United States.

Liquids from the United States are practically an unknown quantity. Occasionally a little American beer is brought in; but beer, wines, and liquors of all kinds are chiefly imported from England, France, Germany, and Portugal, except what is manufactured here. If this class of exports should be sent here, the packing should be done in such a manner that the bottles, packed in barrels, should be so well protected with shavings, etc., as to reduce breakage to a minimum.

American iron manufactures seem to be packed so satisfactorily that I hear of no complaints whatever.

Hardware, such as screws, hinges, bolts, knives and forks, locks, nails, files, handsaws, chisels, hammers, small brass articles, etc., should be put up in small packages, perhaps of pasteboard, and then securely packed in a good, strong box or case. Unfortunately for us, importers say, this class of goods is so much cheaper in England and Germany that they buy in one or both of those countries. Carpenters assert that edge tools coming from these countries are usually so inferior that that are unable to find, as a rule, a first-class article among them. American edge tools are therefore imported to satisfy the demands of those who want the best in this line. Some hardware dealers also say they keep American spades, shovels, and hoes to supply a certain class who prefer them, though higher in price than the European articles. In many things in the hardware line, as in the dry goods, our manufacturers make too good an article for this market. Cheap and inferior but showy articles seem to have a much better market than superior and more expensive articles.

American cheap jewelry suits this market well. It is very much liked, it seems. So are our revolvers and clocks, the latter of which are found in every store dealing in that class of goods, but the complaint is made that they come very badly packed.

DUTIES ON PACKAGES.

Customs duties are all specific, the charge being not only on the goods themselves, but also on the covering, of whatever kind or nature it may be. But importers say they would rather pay the additional duty upon the heavy-weight covering such as I have described than have the goods run the risk of damage.

DAVID N. BURKE,
Consul.

PERNAMBUCO, *November 7, 1893.*

RIO DE JANEIRO.

All goods reach this port by steam and sailing vessels direct; they are landed by lighters, are provided with suitable protection, and are not liable to be exposed to the elements.

Goods are shipped to the interior almost entirely by rail in packages and boxes, as is customary in the United States. Such goods as are forwarded to the country districts by pack mules or porters are repacked in this city for the journey.

The best material for outside covering is such as is light, durable, and dry—such as is used in the United States.

Customs duties are charged in some instances on tare. Below is a statistical table showing how most goods are listed for duty by the Brazilian Government.

Goods which pay custom-house duties on gross weights (packages included).

Tariff No.	Articles.	Packages.
	CLASS 2.—HAIR, SKINS, AND FEATHERS.	
	Raw or prepared.	
2	Human hair	In boxes, cardboard boxes, or similar packages.
3	Manes or horsehair or hair of any other animal	In bales or bags.
5	Feathers of any quality	Do.
	Manufactured.	
6	Buttons of hair of any quality	In boxes, cardboard boxes, or similar packages.
7	Wigs of human hair and other manufactures of the hairdresser	Do.
11	Cordage of any quality in piece or manufactured	In bales.
18	Feathers for writing of any quality	In boxes, cardboard boxes, or similar packages.
19	Brushes (fine in quill stalks for drawing and similar in hair-brushes, with bone, horn, ivory, mother-of-pearl, or tortoise handles).	Do.
	CLASS 3.—LEATHER AND SKINS.	
	Raw, prepared, or tanned and varnished.	
23	Leather, prepared and tanned, of any quality	In bales.
	Manufactured.	
26	Leather bags, satchels, indispensables, and cases of any quality.	In boxes, cardboard boxes, or similar packages.
44	Tips of billiard sticks	Do.

Goods which pay custom-house duties on gross weights (*packages included*)—Continued.

Tariff No.	Articles.	Packages.
	CLASS 4.—MEATS, FISH, OILY MATTERS, AND OTHER ANIMAL PRODUCTS.	
49	Purified oil for sewing machines and similar use	In cans or bottles.
50	Lard or hog grease, melted or prepared	In cans, bottles, buckets, or similar packages.
51	Meats of any quality and prepared in any form	In tins or cases.
52	Wax of any quality	In troughs or cakes covered with straw or cloth.
54	Spermaceti in candles	In boxes, cardboard boxes, or similar packages.
56	Milk, preserved or prepared in any way	In cans, bottles, and similar packages.
57	Beef and pork tongues, tripes, intestines, etc	In cans or bottles.
58	Butter (dairy)	In cans, bottles, or similar packages.
60	Shellfish, oysters, cockles, etc., and roes, preserved or otherwise prepared.	In tins or bottles.
61	Cheese of any quality	In tins or caskets.
62	Soap, without perfume (black or dark, yellow, and white)	In tins.
65	Stearin, raw or in candles	In boxes, cardboard boxes, or similar packages.
	CLASS 5.—IVORY, MOTHER-OF-PEARL, TORTOISE SHELL, ETC. *Manufactured.*	
76	Ornaments or any other fancy objects or of embellishment of bone, horn, ivory, mother-of-pearl, or tortoise shell ornamented with gold or silver.	In boxes, cardboard boxes, or similar packages.
77	Snuff boxes of bone, horn, ivory, tortoise shell, or tortoise and horn.	Do.
78	Buttons or marks of bone, horn, ivory, mother-of-pearl, or tortoise shell, inlaid or incrusted with tortoise shell or any other material, except gold and silver, manufactured in any form.	Do.
83	Combs of bone, horn, ivory, or tortoise in any form	Do.
86	Any other manufactures of bone, horn, ivory, shell, mother-of-pearl, and tortoise, not classified in the tariff.	Do.
	CLASS 6.—FRUITS.	
	Green and dried fruits of any quality; fruits in preserve, sauce, paste, and jelly; fruits as sweets, crystallized, or prepared in any other way.	In cans, bottles, caskets, or similar packages.
	CLASS 7.—VEGETABLES AND FARINACEOUS CEREALS.	
	Canary seed; rice, with or without husk; barley of any quality, bran of any quality, flour, beans, macaroni, Indian corn, and any other farinaceous vegetables and herbs.	In caskets, tins, bottles, bags, or similar packages.
	CLASS 8.—PLANTS, LEAVES, FRUITS, SEEDS, ROOTS, BARKS, FORAGE, AND SPICES.	
102	Berries, grains, beans, fruits, seeds, nuts, etc. (medicinal and for dyeing, etc.).	In caskets, wooden or cardboard boxes, or bales.
104	Juice of tamarinds	In bottles, cans, and similar packages.
105	Barks and woods, medicinal and for dyeing	In caskets, wooden or cardboard boxes, and bales.
106	Onions and garlic of any quality and prepared in any way	In bottles, cans, or similar packages.
108	Mushrooms, dry or preserved	Do.
109	Cloves	In bags.
110	Hay, oats, oat straw, and any other forages (green or dried)	In bales.
111	Leaves, flowers, herbs, stalks, etc., for medicinal or dyeing purposes.	In caskets, wooden and cardboard boxes, and bales.
112	Tobacco for smoking, chewing, and snuffing	In tins, lead, cardboard boxes, and similar packages, and bags and bales.
114	Pepper of any quality	In bottles, double tins, and similar packages, and in bags.
115	Roots and bulbs for medicinal, dyeing, and other uses	In caskets, wooden and cardboard boxes, and in bales.
116	Any other spices not classified	In tins, bottles, and similar packages.

Goods which pay custom-house duties on gross weights (*packages included*)—Continued.

Tariff No.	Articles.	Packages.
	CLASS 9.—VEGETABLE JUICES OR FLUIDS, ALCOHOLIC AND FERMENTED DRINKS, AND OTHER LIQUIDS.	
117	Tar and pitch	In barrels, clay, or crockery pots, and tins.
118	Sugar, candy, grape sugar (or glucose), etc	In bags.
120	Koumiss	In cans, bottles, and similar packages.
122	Camphor	In caskets and wooden and cardboard boxes.
125	Gums, resin, and balsams	Do.
129	Opium, crude or solid	Do.
130	Fruit juices of any quality	Do.
131	Vinegar (common) for cooking, red, white, compound, or for preserves.	In cans, bottles, or similar packages.
133	Sirups, not medicinal	In caskets and wooden and cardboard boxes.
	CLASS 10.—MATERIALS OR SUBSTANCES FOR PERFUMERY, DYEING, PAINTING, AND OTHER USES.	
	Musk, ultramarine blue, bister, carmine, charcoal for drawing, blue ash, cochineal, fine coral in powder; aniline, fuchsine, and similar colors of any quality (solid and fluid); cork in powder, or black of Spain; essences, shoe blacking (fluid, in paste, and powder); indigo, kermes, animal or vegetable, or cochineal kermes; oily lacar or nacar of any color, pencils for drawing and design writing, and pencil points; color materials, such as alizarin, anchusin, garancin, indigotin, hematin, and others not specified; pigments for gilding, ochers (natural oxides of iron) of any quality; fixed liquid and concrete oils of any quality; pyrogenous and empyreumatic oils of any quality, perfumes, powders for printing; colored powders for gilding and silvering, dry or in varnish; bone black, rouge, sinople, sumac, sienna, inks of any quality; Paris green, etc.; and varnishes of all kinds.	In ordinary painted or varnished wooden boxes; in cardboard boxes; in packets, cans, and bottles; in clay, china, or glass pots; in tubes and metal cylinders.
	CLASS 11.—DRUGS AND MEDICINES.	
	Chemical products, pharmaceutical compositions, and medicines in general.	In wooden and cardboard boxes, in cans, and in bottles.
	CLASS 12.—WOOD.	
	Raw and prepared.	
344	Cork and cork wood	In bags.
	Manufactured.	
348	Needles for tricot (knitting) and similar purposes	In boxes, cardboard boxes, and similar packages.
349	Needle cases	Do.
364	Snuff boxes of beech or pine; small boxes for wafers, for chemists, etc.; and large boxes, painted or unpainted.	Do.
366	Buttons and marks	Do.
368	Handles and heads for sticks, canes, umbrellas, small instruments or tools, brooms, penholders, etc.	Do.
379	Cruets and liquor stands	Do.
391	Combs of any quality	Do.
393	Bracelets or other ornaments of sandal or similar woods, plain or inlaid with any other material.	Do.
	CLASS 13.—CANE, BAMBOO, OSIER, ETC.	
415	Baskets, panniers, wicker baskets, bags, and indispensables for sewing and other uses, with or without appertainings, simple, bordered, ornamented, or lined with silk.	In boxes, cardboard boxes, and similar packages.
	CLASS 14.—STRAW, ESPARTO, PITA, AND OTHER FIBROUS MATERIALS.	
423	Raw, prepared, or hackled and combed	In boxes, cardboard boxes, and similar packages.
424	In thread, simply and twisted, or twine of any quality in balls and spools.	Do.
425	Paina of any quality	In bags.

Goods which pay custom-house duties on gross weights (*packages included*)—Continued.

Tariff No.	Articles.	Packages.
	CLASS 14.—STRAW, ESPARTO, PITA, ETC.—continued.	
433	Baskets, panniers, wicker baskets, bags, and indispensables for sewing and other uses, with or without appertainings, simple, bordered, ornamented, or lined with silk.	In boxes, cardboard boxes, and similar packages.
437	Cordage of any quality, in pieces or remnants and manufactured.	In cases.
	CLASS 15.—COTTON.	
	Raw or prepared.	
450	In thread for weaving or warping (unbleached, white, or dyed), twisted and braided for ships, and cord of any quality on spools, in balls, and skeins, for sewing, crocheting, knitting, and similar uses.	In boxes, cardboard boxes, and similar packages.
	Woven and manufactured.	
452	Cord, laces, tassels, halters, and similar articles	In boxes, cardboard boxes, and similar packages.
459	Buttons	Do.
508	Rags, borders, and cuttings	In bales.
	CLASS 16.—WOOL.	
	Raw and prepared.	
513	In thread for weaving and warping, of wool or of wool and cotton, inclusive of such for fringes and similar purposes, and loose for embroidering.	In boxes, cardboard boxes, and similar packages.
	Woven and manufactured.	
515	Cord laces, tassels, halters, and similar of pure wool or mixed with cotton or linen.	In boxes, cardboard boxes, and similar packages.
525	Buttons	Do.
556	Rags, borders, and cuttings	In bales.
	CLASS 17.—LINEN AND JUTE.	
	Raw and prepared.	
558	Raw, prepared, hackled, combed, or braided (dyed or painted)	In bales.
559	Thread of any quality	In boxes, cardboard boxes, and similar packages.
560	Tow, raw or prepared	In bales.
	Woven and manufactured.	
562	Cord laces, tassels, and similar manufactures	In boxes, cardboard boxes, and similar packages.
567	Buttons	Do.
576	Cordage of any quality	In cases
597	Rags, borders, and cuttings	In bales.
	CLASS 18.—SILK.	
	Raw and prepared.	
601	Thread of any quality	In boxes, cardboard boxes, and similar packages.
	Woven and manufactured.	
609	Buttons of pure silk, of silk and any other material, or of any other material covered with silk.	In boxes, cardboard boxes, and similar packages.
	CLASS 19.—PAPER AND ITS APPLICATIONS.	
	Albums, caskets, white and colored cardboard, playing cards; printed books, journals, periodicals, and reviews; maps, music, printed matter, forms made of cardboard, and paper and cardboard of any quality.	In boxes, cardboard boxes, and similar packages.
	CLASS 20.—STONES, EARTH, AND OTHER MINERALS.	
655	Clay and sand for molding	In barrels or cases.
656	Potters' refractory earth	In barrels.
657	Asphalt (coal tar, liquid, or solid)	In barrels or tins.
665	Chalk of any quality	In cases, cardboard or wooden boxes, and similar packages.

Goods which pay custom-house duties on gross weights (packages included)—Continued.

Tariff No.	Articles.	Packages.
	CLASS 21.—CROCKERY AND GLASS.	
677	Needle cases, bracelets, toys, brooches, ornaments, etc.	In boxes, cardboard boxes, and similar packages
680	Buttons	Do.
684	Glass in mass, conical or in tubes for cutting or polishing, and cut, polished, or imitation of precious stones.	Do.
688	Glass beads of any quality	Do.
	CLASS 22.—GOLD, SILVER, AND PLATINUM.	
696	Tin foil for gilding and for dentists	In boxes, cardboard boxes, and similar packages.
697	Silver purls, fringes, galloons, epaulets, tassels, etc.	In boxes and cardboard boxes.
	CLASS 23.—COPPER.	
	Needles, bijoutry, buttons, epaulets and tassels, wire, foil for gilding, etc., and any other such articles not classified in the tariff.	In boxes, cardboard boxes, and similar packages.
710	Fringes, galloons, cords, laces, trimmings, and similar manufactures.	In wooden or cardboard boxes and similar packages.
	CLASS 25.—IRON AND STEEL.	
	Needles, steel bijoutry, buttons, thimbles, wire and buckles, writing pens, nails and tacks, and all other such manufactures not specified in the tariff.	In boxes, cardboard boxes, and similar packages.
	CLASS 26.—METALLOIDS AND VARIOUS METALS.	
	Aluminium, antimony, arsenic, bismuth, bromo, cadmium, chlorine, sulphur, iodine, mercury, nickel, phosphor, soda, and other metalloids and metals not classified in the tariff.	In wooden and cardboard caskets.
	CLASS 27.—ARMAMENT AND OTHER MANUFACTURES OF ARMOR, OBJECTS OF AMMUNITION AND WAR SUPPLIES.	
809	Fuses for firearms	In boxes, cardboard or tin boxes, and similar packages.
815	Touchholes for firearms	In tin, wooden, or cardboard boxes, and similar packages.
817	Powder of any quality	In tins or cardboard boxes.
	CLASS 28.—CUTLERY.	
	Knives, razors, and erasers	In boxes, cardboard boxes, and similar packages.
	CLASS 29.—WATCHMAKERS' MATERIAL.	
	Watch keys, hands, springs, and any other single pieces of watch or clock movements and watch glasses.	In boxes, cardboard boxes, and similar packages.
	CLASS 31.—MATHEMATICAL, PHYSICAL, CHEMICAL, AND OPTICAL INSTRUMENTS AND OBJECTS.	
	Electro-galvanic and electro-magnetic rings, collars, and chains, and optical glasses of all descriptions.	In boxes, cardboard boxes, and similar packages.
	CLASS 32.—CHIRURGICAL AND DENTAL INSTRUMENTS AND OBJECTS.	
905	Empty boxes, portfolios, and sheaths for chirurgy and dentistry.	In cases, boxes, and on cardboards.
910	Artificial teeth	In boxes, on cardboards, and similar packages.
928	Paste for filling teeth, inclusive of cadmium	In boxes or on cardboards.
936	Syringes and clysters	In boxes, cardboard boxes, and similar packages.
	CLASS 33.—MUSICAL INSTRUMENTS, ETC.	
963	Cords and strings (metal, gut, silk, etc.)	In wooden, zinc, tin, and cardboard boxes and similar packages.
972	Portable or hand hormonicas, harmoniflutes, harmoniums, accordions, and concertinas.	In boxes, cardboard boxes, and similar packages.

Goods which pay custom-house duties on gross weights (*packages included*)—Continued.

Tariff No.	Articles.	Packages.
	CLASS 34.—MACHINERY, APPARATUS, TOOLS, AND VARIOUS UTENSILS.	
1034	Seals with handles, of any quality	In boxes, cardboard boxes, and similar packages.
	CLASS 35.—MISCELLANEOUS.	
1046	Dolls	In wooden and cardboard boxes and similar packages.
1047	Rubber mouthpieces and pouches for tobacco, match boxes, toys, and similar manufactures and rubber buttons.	In boxes, cardboard boxes, and similar packages.
	Rubber combs, rules, and penholders; rubber prepared for dentists (vulcanite); rubber bracelets, earrings, medals, and other ornaments; rubber staffs, tubes, and stalks for flowers.	Do.
1048	Toys for children manufactured of wood, paper, cardboard, china, glass, tin, lead, zinc, or of any other ordinary metal.	In wooden or cardboard boxes and similar packages.
1049	Powder puffs	Do.
1050	Pipes and mouthpieces for cigars and cigarettes from India, denominated *ocnas*, of clay, china, or wood, with horn or wooden tubes, and similar articles of amber, meerschaum, and their imitations.	Do.
1051	Boxes and caskets of any material and of any quality	Do.
1052	Portfolios, cigar-holders, pocketbooks, and tobacco pouches of Chilean and Peruvian straw, ivory, mother-of-pearl, silk, velvet, tortoise shell, leather, rubber, celluloid, cork, papier-maché, horn, cotton, wool, and linen.	Do.
1055	Chocolate of any quality	In caskets, boxes, tins, bottles, and similar packages.
1056	Manufactures imitating hair	In boxes, cardboard boxes, and similar packages.
1057	Wreaths for graves	Do.
1858	Sweets and confectionery not classified	In tins, bottles, caskets, or similar packages.
1059	Dynamite and other explosives	In tins.
1060	Shading stumps for artists	In boxes, cardboard boxes, and similar packages.
1061	Looking-glasses and pictures	Do.
1064	Firecrackers	In any other packages but cases.
1066	Tinder of any quality	In bags or bales.
1067	Fuses of bone, horn, or ordinary metal, with steel and flint and similar.	In boxes, cardboard boxes, and similar packages.
1068	Checkers, backgammon, chess, dominoes, etc	In wooden or cardboard boxes, and similar packages.
1069	Sealing wax	Do.
1074	Masks	Do.
1075	Matches	In wooden or cardboard boxes, tins, and similar packages.
1076	Sauces and liquid condiments	In tins, bottles, and similar packages.
1077	Manufactures of cocoa fiber	In boxes, cardboard boxes, and similar packages.
1078	Wafers	Do.
1081	Paraffin, singly or compound, or kerosene wax, raw or in candles.	Do.
1083	Powders or any other preparations for killing or destroying insects and other animals.	Do.
1084	Rosaries (common), with wooden, cocoa, china, glass, or similar beads.	Do.

You will find this report both accurate and comprehensive, and I trust it will be of material benefit to shippers in the United States.

WM. T. TOWNES,
Consul-General.

RIO DE JANEIRO, *October 15, 1893.*

BRITISH GUIANA.

DEMERARA.

As a general rule American merchandise arrives here in about as good condition as that imported from other countries. All goods come by steamer or sailing vessel. The cargoes of all vessels consigned to British Guiana are discharged at Demerara, with very few exceptions. Occasionally a vessel goes to Berbice, otherwise called New Amsterdam; the same conditions existing here are to be met with there.

LANDING AND WAREHOUSING.

As a general rule, cargoes are discharged at the consignee's wharves, or *stellings*, though occasionally, when the consignee's *stelling* is occupied by some other vessel or for other reason, it is necessary to use lighters in discharging.

The *stellings*, wharves, or warehouses, as they are variously called, are generally in good condition and afford proper receptacles for freight. They are all covered, but some of them are without walls or any side protection. When the goods are landed at a *stelling* of this character they are more or less exposed to damage by water. At certain seasons of the year it rains here almost incessantly, and it is obvious that the risk to which they are subjected is considerable. The average annual rainfall at Demerara is over 90 inches.

EN ROUTE TO THE INTERIOR.

Most of the goods coming here, whether intended for local use or for interior shipment, are unpacked at Demerara. Some classes of goods, however, intended for the interior could, with little or no additional cost, be put up in such a way as to be much more satisfactory to the trade. There is only one short line of railroad in the colony of British Guiana, and its commercial importance as a carrier of goods is insignificant from the fact that it extends along the coast for a distance of about 40 miles and does not enter the interior. The only business occupation of those living in the interior is gold-mining. Naturally, therefore, nothing is sent there but provisions, drugs, machinery, etc. These goods are taken part of the way in open boats, and part of the way by porters. Since it requires from two weeks to a month to reach the various mines, and as the goods are constantly exposed to the elements, it is apparent that the packing and covering of the packages should be as near waterproof as it is possible to make them. The packages should not exceed in weight what the ordinary man is able to carry—say about 75 pounds. The dimensions or shape of the package do not make any material difference. It is impossible to use horses for taking goods to the interior, for the reason that, excepting in Demerara and vicinity and around the various sugar estates, there are no roads, and the country, or "bush," as it is termed here, is covered with such a dense growth of trees, brush, vines, weeds, etc., that it would be impossible for a horse to make any headway.

OUTSIDE PACKAGES.

Dry goods.—What few dry goods are imported here are not put up and packed as they should be, and this may be one reason why our trade with Demerara in this line is so insignificant. English and German goods have practically driven us out of the market. One reason for this is the fact that their goods always reach here in good condition. It is not probable, according to the statements made by dry-goods importers, that the United States, with the present prevailing prices, could secure much of the trade in woolen goods, the price of woolens brought from Germany and England being considerably lower for the same class of goods than those quoted from the United States. There is no good reason, however, why the United States could not enjoy the practical monopoly in this market for all cotton goods consumed. Other nations send their representatives and commercial agents here to encourage trade in every way; we do not. Other nations exhibit samples of their goods and quote prices; we do not. The writer has some personal knowledge of the cost of American manufactured cottons and is prepared to say that the prices paid by Demerara importers for cottons bought from Great Britain and Germany are considerably in excess of the prices asked in the United States for goods of equal grade. This applies to the following named goods: Prints, ginghams, Osnaburgs, bleached and unbleached cottons, denims, ducks, drills, etc. The cheaper classes of dry goods, when sent here from European countries, are put up in the following way: First, a wrapping of brown paper; second, a cheap grade of oilcloth; and last, a jute bale—all firmly bound by strong iron straps. The goods are thus well protected from the elements, whether in transit or on the wharves. American packers of what few goods of this character are imported do not employ these precautions, to the consequent dissatisfaction of the importer. Dry goods of the better class, also notions, millinery, or anything else which could be damaged by water or exposure for a considerable length of time in a very moist atmosphere, are packed in Great Britain, Germany, France, and Belgium with due regard to the necessary precautions which must be taken in view of the peculiarities of this climate and the fact that the warehouses or wharves, as before described, do not in all cases afford adequate and necessary protection to their contents. These goods come put up in stout, substantial wooden cases, strongly bound with heavy iron straps, and with the contents properly protected by at least one, and sometimes two, layers of waterproof paper or cheap oilcloth, together with the brown-paper wrappers. American goods of the same class are frequently encased in thin and unsubstantial boxes, the only interior protection to the goods being the brown-paper wrapping; in many cases there are no straps on the cases at all, and more frequently still the straps are not strong enough to protect the cases in rough handling, such as they almost necessarily receive when the vessel is loading or discharging. European nations, in packing goods of this description, almost invariably have their packing cases zinc lined. Another reason why American dry goods are not bought for this market is the apparent unwillingness which formerly existed among manufacturers to put up their goods in pieces of even length. Forty-yard pieces seem to be the most desirable. The writer happens to know that the manufacturers at home are now doing this extensively, and if the fact becomes generally known among the local importers, it is very probable that the effect would be important in once more returning American dry goods to favor in this colony.

Groceries and provisions.—That the United States have the bulk of the business here in groceries and provisions is due to force of circumstances rather than to the fact that the trade is solicited. It could be increased if proper attempts were made. Nearly all the flour, salt beef, salt pork, and heavy groceries of that character come from the United States. The bulk of the fancy groceries, with few exceptions, is imported from England and France, and for no other reason than that we do not intelligently seek the trade. If American flour were put up in half barrels, it would be much more satisfactory to merchants whose business is with the interior, for reasons before stated. Barrels can not be carried to the interior by porters, and when the flour is contained in sacks it is often damaged by the exposure to which it is necessarily subjected while in transit. American canned and tinned goods are generally found to be in satisfactory condition on arrival here. Occasionally, however, sufficient care is not taken in the packing. The cases are often weak and flimsy. In many instances the straps binding the cases are not sufficiently strong to hold them together. As a result, the cases which contain heavy goods are broken and their contents lost or stolen. This is a very general complaint. Not only flour, but pork and beef, intended for interior shipment, should be put up in half barrels. Another source of dissatisfaction is the weakness of the bagging containing feed corn which is shipped here. The bags frequently burst in handling, and their contents are lost or damaged.

Liquids.—The principal business between the United States and British Guiana in liquids is in kerosene oil. It is hard to suggest a safe method of transporting this oil other than by a tank steamer, and there is hardly a sufficient quantity of it consumed in this consular district to warrant the adoption of this method, unless the importers would combine their shipments as cargo of one vessel, which should make periodical trips at intervals of several months. The oil brought here is contained in tin cans packed two in a case. These tin cans are thin and badly soldered, hence the leakage is considerable. The cases are thin and insufficiently nailed. As the United States have a practical monopoly in this article, it is doubtful whether our oil exporters would go to the trouble and expense of remedying the defects mentioned. The loss that is sustained must fall on some one, and this "someone" is the American underwriter, who should see to it that the goods are properly put up for shipment to foreign markets. The loss by leakage of oil for the past six months has been greater than the damage sustained by any article in the list of American products consigned to this market. Lard oil, cotton-seed oil, and lubricating oils come here in barrels, sometimes in satisfactory condition and sometimes with considerable leakage. A Baltimore firm has built up an extensive business in oils in this market by having their barrels always properly coopered. Other dealers might follow the example of this firm with profit to themselves. Bourbon and rye whiskies are not in much demand here, on account of the cheapness of the Scotch and Irish articles. What little American whisky is imported is put up in cases containing a dozen quart bottles each, and arrives in good condition. There is a small amount of American keg beer imported here, which is also satisfactory. As American beer (not ale) is much superior to the English article, a very considerable trade in it could be with little effort established. Drugs and most of the other liquids are generally satisfactorily packed. The only exception to this statement is in the instance of liquids contained in glass carboys, which are not of sufficient thickness. The writer had a personal experience of this fact when coming to Demerara. The vessel met with some rough weather, the carboys which contained acids were broken, and everyone on board was nearly blinded for several days. The acids, of course, were lost, the underwriters suffering the loss.

Hardware and iron manufactures.—Nearly all the cutlery imported here comes from England and Germany, and it is claimed that the United States can not compete with those countries. We do export to this colony, however, a considerable amount of wooden ware of all kinds, shovels, stoves, picks, axes, etc., all of which seem to be properly prepared for shipment and arrive in satisfactory condition. Galvanized-iron buckets from England have to a great extent displaced American wooden buckets, which were formerly brought here in large quantities. Heavy iron of all kinds, such as beams, channels, bar iron, rods, T rails, etc., come from England exclusively. Nails, both wire and cut, are imported to this consular district from Germany alone, and for no other apparent reason than that there has been no effort made to extend our sales in this branch of the American iron industry. It is the opinion of the writer, who is to a slight extent personally interested in the manufacture of nails, that the United States can successfully compete with Germany or any other nation in this business. Though there is very little difference between the nail market quotations of the United States and Germany, the freight rates from Germany to Demerara are almost double those asked of shippers from American ports.

Furniture.—Furniture of the better class is brought here from different parts of Europe, and it is the uniform testimony of dealers that these goods can be got at prices lower than those asked by the American manufacturers. This is not a matter of much importance, as there is little or no fine furniture demanded for this market. In other kinds of furniture no one of the other nations professes to be able to compete with us either in prices or in the general excellence of the goods, and we enjoy a practical monopoly in this line. There is considerable complaint of the packing of some of the

American furniture imported here, but it is doubtful whether anything can be done to obviate the difficulties in the case, because they have their origin here. There is a certain wood ant, native to the northern coast of South America, which eats up the soft wood of the packing cases, and eventually works its way into the furniture, thereby destroying or badly damaging it. The only intelligent remedy which has been suggested for this trouble is that the packing cases containing the furniture should be zinc lined.

DUTIES ON PACKAGES.

There is no customs or import duty charged on the package itself.

AMERICAN INDIFFERENCE.

It is to be regretted that Americans doing business with South American countries have for some unaccountable reason paid little attention to British Guiana. Whether this is due to their lack of enterprise or to their ignorance of the fact that nearly this whole trade is naturally tributary to the United States, it is impossible to say. As it is, the bulk of this trade goes elsewhere, though it requires only a little energy and enterprise to divert it from our European competitors to ourselves. These criticisms apply in particular to those of our citizens who are engaged in the business of exporting dry goods. The United States are about 1,000 miles nearer to British Guiana than is any other producing nation from which supplies can be received. As a natural result freights are cheaper, and foreign nations are at a disadvantage to that extent. There is no lack of opportunity to ship American goods here. L. W. & P. Armstrong, of New York, have a steamer running regularly to Demerara and also a line of sailing vessels. George Christall & Co., of New York, have three steamers engaged in the Demerara, Grenada, and Trinidad trade. Never a month passes but that a sailing vessel owned by James E. Brett & Co., of New York, arrives at this port. The same is true of the vessels controlled by John S. Emery, of Boston.

If several American firms representing different industries or products would send an agent here to represent them, having prices, samples, etc., it would not only pay the concerns employing him, but the agent himself very handsomely.

The small importer whose consignment is only a portion of a vessel's cargo has a much better arrangement with the consignee of the vessel when the goods come from England than is the case when they are imported from the United States. This is a matter which concerns both consignor and consignee, and is entitled to some attention. The Demerara importer of goods from England pays the consignee his freight for whatever goods are brought out, and in addition thereto pays an extra 5 per cent on the amount of that freight, with the binding agreement that before the expiration of a certain length of time the goods shall be delivered at the owner's warehouse. The vessel's consignee makes the charge for such handling and delivery 5 per cent. This is an admirable system and works advantageously to all parties concerned, as the goods, according to the terms of the contract, must be delivered within a stipulated time, and are therefore not allowed to remain on the *stelling*, to the inconvenience of the owner and to his possible loss by exposure of the goods to the elements.

LOUIS S. DELAPLAINE, Jr.,
Consul.

Demerara, *November 24, 1893.*

CHILE.

IQUIQUE.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach this district in sailing vessels, by the Merchants' line of steamers from New York via the Straits of Magellan, and by steamer and rail via Colon and Panama. Shipments to this coast are also made in steamers from New York via Hamburg.

As a rule only such goods as are urgently needed, and where the gain in time offsets the increased expenses of transportation on the isthmus, are shipped via Panama.

Their unloading at Colon, their reloading on the train at that port, and their discharge and reshipment at Panama expose the goods to damage, which can not be avoided in a certain class of goods, notwithstanding the greatest care in packing. The high freights on the isthmus offer an additional obstacle to the shipment by that route of heavy machinery and other bulky goods.

The Merchants' line of steamers from New York supplies a want which has long been felt. As the steamers leave that port for the west coast every forty days, merchants do not need to make such heavy orders as formerly, and by carrying smaller stocks can renew them with greater frequency and so keep pace with the changing demands of the market. The rates of freight by this line of steamers are now on a par with those by sailing vessels.

LANDING AND WAREHOUSING.

Goods are landed at this port by lighters.

Government warehouses are provided for the storage of goods, and, although at times large quantities are temporarily left on the esplanade adjoining the custom-house, no risk of damage from the elements is incurred, as the goods are protected from the sun, and there is no rain to be feared.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the nitrate establishments in the interior direct by rail, with no intermediate handlings. When sent to places off the line of the railroad, they go on pack mules or donkeys. To determine the sizes and weight of the packages to be conveyed in this way, it should be borne in mind that a donkey will carry up to 200 pounds—100 pounds on each side—and a mule from 250 to 300 pounds, so that the packages should not exceed 150 pounds each.

OUTSIDE PACKAGES.

Dry goods should be packed in bales, rather than in boxes, with waterproof wrapping, covered with Hessian or gunny cloth, all well secured with iron bands.

Glassware and crockery should be packed in barrels, boxes, or crates. With these the greatest care should be taken in packing; otherwise breakage is inevitable. Within the last few days I have seen in the same warehouse two barrels of glassware, one from the United States and one from England. In one barrel were packed tubes for lamps, a layer of straw alternating with a layer of glass tubes. Each tube, however, was in direct contact with its neighbor, and the loss by breakage was about 20 per cent. In the other barrel not a single article was broken, for each was wrapped separately in straw.

In packing, economy of space should always be taken into consideration. An immense saving to the consumer is secured by forethought and the exercise of plain common sense in this respect. Ladies' work tables of bamboo and open cane work, for instance, if put together at home and packed each in its own box, occupy a great deal of space, whereas a dozen might be packed in the same box in separate pieces, the tables to be put together here at a trivial expense.

I will mention another instance which has come under my own observation. A merchant of this city ordered 100 dozen patent wire flytraps. Each trap came out in a separate box. To pack each trap in a box by itself was well enough, but then the hundred boxes might have been bound securely together in one single package or, at most, two packages, thus insuring greater security and greatly reducing the expense, for launch hire and mole dues are collected according to the number of packages.

Experience shows that heavy machinery and stoves should be shipped as manufactured. Breakage of stoves packed in boxes or crates is of very common occurrence. This generally happens at the time of discharging the boxes into the lighters, and is solely the result of carelessness. Care is taken in lowering an unpacked stove into the launch and so breakage is avoided. The covers, feet, and other loose pieces should be carefully packed in the inside of the stove and so secured as to be immovable. If heavy machinery is shipped unpacked, breakage, for the same reason, rarely occurs.

If stoves and similar merchandise are shipped in boxes or crates, duties are collected on the gross weight of the package.

Sewing machines should be flat packed, both for economy of space and for greater security. The machine proper should be securely screwed to the bottom of the box.

About fifteen years ago I had occasion to repeat the complaints of merchants of this city on account of the style of packing American goods. The complaints were then well founded. Since then a complete revolution has taken place in this respect. Leading merchants in various branches of trade have assured me that no goods come better packed than those from the United States.

J. W. MERRIAM,
Consul.

IQUIQUE, *November 6, 1893.*

TALCAHUANO.*

OUTSIDE PACKAGES.

Dry goods.—Flannels and valuable cloths should be packed in strong cases, iron hooped, with inside tin cases; Osnaburgs, cottons, etc., in bales made waterproof and well hooped or secured, as goods are roughly handled in discharging. The better the package the less risk for the merchant. Packages should not exceed 220 or 440 pounds gross weight.

Groceries.—Light packages or cases are recommended to avoid breakage. On this account tin, for inside package, is preferable to glass for preserves, etc.

Liquids.—Iron cans or drums for oils, etc., are better than wooden barrels, on account of leakage occasioned by rough handling. Liquors, whisky, etc., are generally preferred in 10-gallon kegs. Paraffin and refined petroleum should be exported in thick cases of 10 gallons each, and not in barrels. The cases may contain two tins of 5 gallons each.

Iron manufactures.—Very heavy packages are discharged from lighters by steam winches on shore. No pieces should jut or stick out from the package, as they are apt to get broken. I have frequently seen heavy castings with pieces broken off in handling, which could not be repaired here.

Hardware.—These goods should not be placed in packages too large or heavy, particularly if in wooden cases, as they are apt to be broken in handling.

Speaking generally, it may be said that barrels should be strong and well hooped. Sacks or bags are useless, as they are almost sure to be broken or damaged.

EN ROUTE FROM THE UNITED STATES.

American goods are imported nearly always via Cape Horn in sailing vessels, or, if in steamers, via the Straits of Magellan direct. Very little comes via Panama.

LANDING AND WAREHOUSING.

Ships anchor in the port, which is good and safe at all times. All cargoes are landed in launches or open lighters, and a good portion remains exposed over night.

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*In submitting this report the consul says: "Talcahuano represents all southern Chile, the Araucania, etc., and is the only central and important port south of Valparaiso. The greater portion of the agricultural implements and machines, etc., used in Chile are landed here."

The custom-house has storehouses, but all goods have to be received by a custom-house officer on shore; hence they are apt to lie exposed one night at least.

Houses, staves, portable railways, general machinery, castings, and vehicles, and grease, oils, pitch, tar, and other inflammable or explosive articles are not permitted entrance to customs warehouses, but must be dispatched on landing.

EN ROUTE TO THE INTERIOR.

Goods are sent inland by rail, and are generally sent in ox carts—2,000 pounds to each cart—to railroad station. If the quantity is sufficient, a freight car is taken to the vicinity of the warehouse. Very heavy packages must be put on the cars near the landing by the merchant. Portable steam engines, reapers, etc., mounted on wheels are more easily handled—put on cars, etc.—than heavy packages which have no such means of moving. There are no facilities for handling heavy packages; each person is obliged to use his own resources.

DUTIES ON PACKAGES.

Customs duties are paid on net weight, or gross weight for machinery, etc. Where assorted merchandise comes in one package, instead of each kind separately, the duties are, if in cases, 30 per cent additional; if in bales, 6 per cent additional.

The law requires each package to be marked, numbered, and gross weight noted.

I would recommend to shippers to have no English words marked on packages, it being useless. Each package should be clearly marked or branded as per following form:

Mark.—J. F. V. I.
Number.—No. 5.
Direction.—Talcahuano.
Gross weight.—150 kilos peso bruto.
Net weight.—140 kilos peso neto.
Top.—Tapa.
Glass.—Vidrio.
Fragile or easily broken.—Fragil.

EUROPEAN VS. AMERICAN PACKING.

European manufacturers spare no pains in packing to meet the demands of this market; for instance, barbed fence wire is imported from Germany in rolls of 100 pounds (and not over). Hence there is greater demand here for the German wire, as buyers do not care to pay for any difference in weight over 100 pounds to a roll. Kegs containing cut nails get broken. I am informed that a steamer from New York recently, in discharging 1,000 kegs of nails, had a reclaim for 200 kegs broken. Boxes would be far better for nails, etc.

JOHN F. VAN INGEN,
Consul.

TALCAHUANO, *September 1, 1893.*

COLOMBIA.

BARRANQUILLA.

OUTSIDE PACKAGES.

Dry goods.—The importation of American dry goods is very limited. The quality is too good and the texture too heavy. Manchester "shoddy" can be sold much cheaper. A leading commission merchant informs me that hardly any American dry goods go to the interior in original packages. European dry goods come in bales, save some French fancy articles of light nature, which come in huge boxes of light, thin wood.

Groceries.—Rice, beans, pepper, and spices come in bags; other classes in boxes or barrels, according to nature.

Liquids.—Petroleum comes in barrels and in cases of two 5-gallon tins. California wines come in casks.

Iron manufactures.—Strong boxes should be used; heavy pieces, machinery, and barbed wire without covering; nails, spikes, bolts, and rivets in kegs.

Hardware.—These goods should be sent in strong boxes. Fine hardware, such as locks, chisels, planes, hammers, and general shelf ware, is meeting with acceptation here. The quality is superior to European manufacture and the prices are somewhat higher.

EN ROUTE FROM THE UNITED STATES.

Goods reach this port* from the United States by Atlas steamers leaving New York fortnightly, by the Transatlantic-Spanish line monthly, and by Knott's Prince line on irregular dates. Goods receive rough handling on the railroad from the port to this city, and particularly in the custom-house. Complaints, not only of breakage, but of robbery, are frequent.

UNLOADING AND LANDING.

Up to June 15 of the present year goods were landed at Puerto Colombia by means of lighters, the steamers anchoring about 3,000 yards from the pier; but on the date above mentioned the new pier was inaugurated. Ships now moor alongside the pier.

WAREHOUSING.

Under the present system the goods are transferred immediately from the ship to the cars, transported to Barranquilla (18 miles from the port of landing), and deposited in the custom-house.

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*Goods for Barranquilla are landed at Puerto Colombia, at the mouth of the Magdalena, and conveyed to the former place by railroad, 18 miles.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior as far as Honda (600 miles) by steamboats navigating the Magdalena. These steamers are well constructed, and are stern-wheelers. Goods are subject to ordinary steamboat handling. I believe complaints are rare. From the several landings on the river (save at Puerto Berrio, whence a railroad extends several miles into the country) goods are transported on mule back. Sometimes light, fragile goods are taken on the backs of Indian women, a broad, hempen strap passing across the forehead. I have seen many of them marching "Indian file" over the mountains to Bogotá. Packages for inland transportation should not weigh over 125 pounds. Two of such packages constitute a "carga," or a beast's burden. An oblong package is preferable. However, with the exception of petroleum (which comes in cases of two 5-gallon tins), few goods of American manufacture go to the far interior.

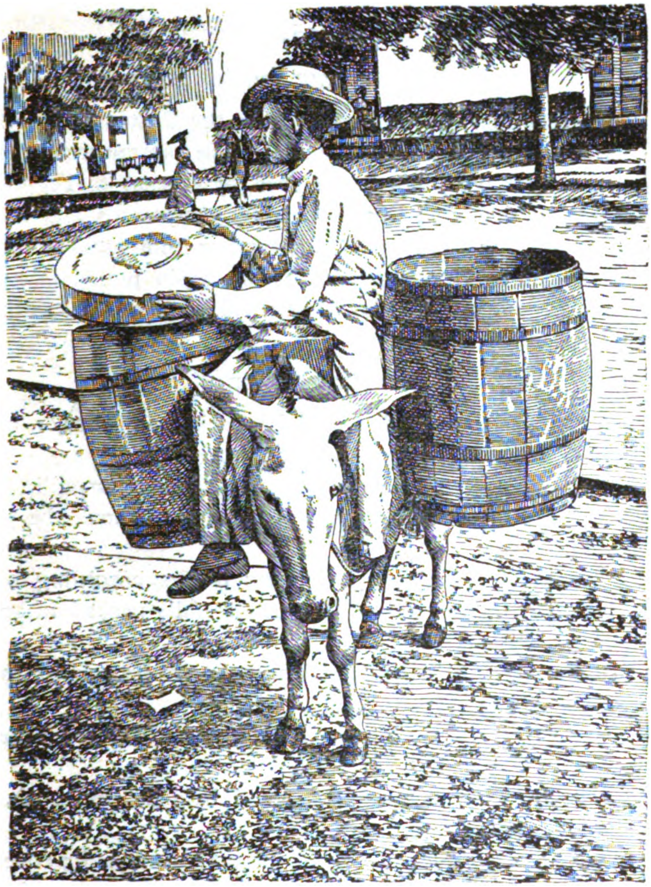
Pianos are transported over the mountains by Indians, the instrument being slung to long, stout poles. The Indians are divided into relays. To the near-by villages goods are transported on "burros" (donkeys), as shown in the illustration. I have seen a drove of these patient little animals coming in from Sabanalarga, 12 leagues distant, each bearing two bales of cotton weighing 125 pounds apiece, having neither stopped nor rested by the way.

OUTSIDE PACKAGES.

The best material for outside packing depends on the nature of the goods inclosed. Petroleum should be in barrels or tin cans cased in wood; printing paper and like goods in bales; nails and bolts in kegs; barbed wire in uncovered reel. Goods liable to damage by water should have an inner covering of heavy oiled or tarred cloth. Hardly any American dry goods in the original packages go beyond Barranquilla. Here they are repacked to suit purchasers. The Americans are called the worst packers; the French the best. A merchant has suggested to me that were American goods, when their nature would admit, packed in barrels, he thinks the percentage of breakage would be lessened. He showed me a box containing three small counter scales, two of which were broken. He says this is not a rare occurrence. Glassware, especially lamps, usually arrive from the United States in a deplorable condition, while the same class of goods from France are comparatively free from breakage.

DUTIES ON PACKAGES.

Custom duties are specific and on gross weight, and in consequence "affect the cost to importers" in proportion to the weight of the cases, etc. I have paid on a box of blank cards more duty on the box than on the cards. The "best package consistent with safety" will depend largely on the class of goods, heavy material requiring heavier and stronger packing than light. Printing types and kindred material must come boxed in 1 or



1½ inch boards, while for straw hats half-inch boards would probably meet the requirement. Knowing that the duties are specific and on gross weight, it would seem that the packer would be the best judge of the strength of packing for the protection of his wares.

E. P. PELLET,
Vice and Deputy Consul.

BARRANQUILLA, *August 14, 1893.*

BOGOTÁ.

EN ROUTE FROM THE UNITED STATES.

With few exceptions, goods coming from the United States and bound for the interior are entered at Barranquilla. After an uncertain delay at the custom-house at that port, they are shipped by steamer to Yeguas. There they are taken off the boat, placed in badly constructed and leaky warehouses, and, after lying there for periods varying from weeks to months, are at last taken by rail to Honda, where they are again placed in warehouses, and after another uncertain delay are carried to their destination in the interior by pack mules.

OUTSIDE PACKAGES.

All goods of whatever kind should be packed in bales or boxes of a maximum gross weight of 150 pounds per package.

Dry goods should be packed in boxes, with canvas and tarpaulin coverings.

Groceries should be in tin cans, which, in turn, should be packed in wooden cases.

Liquids should be packed in tins or glass bottles, according to the kind of liquid; if in bottles, they should be most carefully packed in boxes filled with sawdust.

Iron manufactures, including hardware, should be packed in wooden cases wrapped with tarpaulin and canvas.

After leaving Honda there are no warehouses, and the goods are exposed to the elements.

The average size of a bale or box should be 3 feet in length, 3 feet in width, and 2 feet high.

Flour should be shipped in bags, with canvas and tarpaulin covering, and goods that may be damaged by water should be made waterproof.

The material used for packing pays, according to weight, the same rate of duty as the contents.

JACOB SLEEPER,
Consul-General.

BOGOTÁ, *September 7, 1893.*

CARTAGENA.

EN ROUTE FROM THE UNITED STATES.

Nearly all goods reaching this port from the United States are carried by the Atlas line of steamers. They are loaded in New York in the order of the ports at which the steamers call, so that no rehandling is required until they reach their destination.

LANDING AND WAREHOUSING.

Here at Cartagena we have a most commodious wharf (just completed by an American company) built of wood, 480 by 120 feet, with a large, secure warehouse, 257 by 80 feet, at which all steamers discharge their cargoes.

EN ROUTE TO THE INTERIOR.

The goods shipped to the interior are all carried by steamers up the Magdalena, Sinu, and Atrato rivers. From points off the river they are transported up small streams into the interior by native canoes and pack animals, and are often subjected to much ill treatment en route by unpacking, reloading, and exposure to the elements. I think bad packing has done much to retard our trade in this country, where there is no land transportation except by mules, by trails over mountains, and through swamps, and yet goods from Europe are so packed in small, compact bales of 140 pounds or less, covered with rubber or oilcloth, that they are transported for hundreds of leagues without any serious damage by handling or weather.

DUTIES ON PACKAGES.

All duties are paid on gross weight, which includes boxes and packing materials.

OUTSIDE PACKAGES.

All dry goods should be packed in bales of 5 to 7 cubic feet and of such dimensions as to pack on mule back.

Prints, white shirtings, cambrics, and drills should be packed in bales of forty to fifty pieces or less, weighing about 120 pounds, first covered with strong packing paper; over this tar-coated canvas, and lastly heavy bagging carefully sewn up and strapped with three strong, iron hoops. These bales, when properly packed, should be about 32 inches in length, 12 to 14 inches in height, 26 inches in width, and weigh 120 to 130 pounds.

Flour is much safer put up in two bags—strong cotton and waterproof paper. Much of the flour shipped is in barrels and half barrels, which often arrive broken and damaged.

Canned goods, soaps, etc., should be shipped in compact boxes with iron bands.

Liquids must be securely packed in straw and well iron-strapped boxes 12 inches high and 22 inches in length.

Glassware, crockery, and light hardware, instead of being packed in the heavy pine boxes used in the United States, should be placed in those like the ones used in Europe—one-half inch board in style of crate with wooden straps 12 inches apart to strengthen, without increasing weight.

CLAYTON I. CROFT,
Consul.

CARTAGENA, *September 12, 1893.*

MEDELLIN.

EN ROUTE FROM THE UNITED STATES.

About four-fifths of the importations destined for Antioquia* are landed at Sabanilla (Puerto Colombia†) and then conveyed to Barranquilla. From Barranquilla the journey is continued (five or six days) in steamers up the Magdalena River to a station called Puerto Berrio, the river terminus of a railway now in process of construction to Medellin, of which about 30 miles are at present available, the entire distance being 140 miles. Over the remaining 110 miles goods are carried by pack mules, and it usually takes ten days to cover the distance; travelers, however, perform the journey on horseback in three or four days.

A few importers find it preferable to have their goods landed at Cartagena, and about one-fifth of the importations follow this route, which is through a canal 95 miles in length to the Magdalena River and then up the river to Puerto Berrio, as described above. The Cartagena route would be more generally favored by the public were it not that the canal is frequently in an unserviceable condition, in spite of the large sums of money continually expended upon it.

All goods are subjected to very careless and rough usage, both at the seaports and en route.

LANDING AND WAREHOUSING.

At Puerto Colombia vessels are discharged at a wharf 5,000 feet in length, which has recently been constructed, but at Cartagena goods are landed in lighters.

Warehouses are provided at the seaports and river stations, but during the overland journey from the Magdalena River to Medellin goods are unavoidably exposed to the elements.

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* An inland State, of which Medellin is the capital.

† There is nothing which so retards the development of the valley of the Magdalena as the inability of ocean steamers and sailing vessels to enter the mouth of the river and anchor at Barranquilla. Steamers and sailing vessels now anchor at Puerto Colombia, 18 miles from the custom-house at Barranquilla. The freight is conveyed to and from the vessels by lighters and the railroad at a cost, in many instances, equaling the charges from New York to Puerto Colombia. If these boats could enter the river's mouth, they could sail upstream during the greater part of the year for a distance of 120 miles, and at all seasons from 30 to 40 miles. (CONSULAR REPORTS No. 144, p. 130.)

EN ROUTE TO THE INTERIOR.

Pack mules being employed in conveying goods from the Magdalena River to Medellin, packages must be made up within the limits of bulk and weight that such a method of transportation renders absolutely necessary.

As it is obviously advantageous to reduce the weight of the packing as much as possible, the best form of package is a bale. Not only dry goods, but many drugs and groceries, and even such articles as printing and wall paper, come to Medellin in that manner.

Packages should not exceed 165 pounds in weight, but should approach that limit as nearly as possible, unless the contents are of a very fragile nature, in which case the reduction of weight would lessen the risk of breakage. As to size, it is desirable that one of the three dimensions of the parcel should not greatly exceed the usual width of pack saddles, which is 22 inches—26 inches would be a good limit. The following are good dimensions for bales: Length, 29 inches; breadth and height, 22 inches. For boxes: Length, 35 inches; breadth and height, 26 inches.

OUTSIDE PACKAGES.

All packages containing goods likely to be damaged by water should be waterproof.

Bales containing dry goods are packed in the following manner: Two blankets are wrapped about the goods, one lengthwise and the other crosswise; over the blankets are wrapped, in the same manner, two strips of coarse cotton cloth about 3 yards in length (I forward a sample of the cloth generally used for the purpose, marked No. 1*); over this covering two strips of cerecloth (like sample No. 2*), also 3 yards in length, are similarly wrapped; over the waterproof covering a sort of gunny cloth (like sample No. 3*) is sewn; finally, two iron hoops (like sample No. 4*) keep the bale firmly together. Packing of this kind is very well done in England, principally in Manchester.

Goods that can not stand crushing should be packed in deal boxes, not more than half an inch in thickness; the end pieces, however, should be somewhat stouter, about three quarters of an inch thick, and the box should be bound with two iron hoops (sample No. 5 shows the kind of deal and hoop generally used*). If the contents of the box are liable to injury from wetting, it is wrapped in a cerecloth covering (like sample No. 2*), and over this a gunny cloth (like sample No. 3*) is sewn. If the contents of the box are very delicate and valuable, they are protected not only by the outer covering just described, but by an interior lining of waterproof stuff (like sample No. 6*). The French excel in making up packages of this description.

Kegs, sacks, and bags are convenient forms of packages for transportation on mule back, provided that they can be made up into parcels approaching, without exceeding, 160 pounds in weight.

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*Filed in the Department.

Sometimes, instead of the waterproof covering, a zinc lining is used; but experience has shown that the zinc lining, besides adding considerably to the weight of the parcel, is not so efficient a protection as the cerecloth covering.

Bulky parcels containing fragile goods, such as mirrors, glassware, etc., are carried by porters. It is not necessary to fix definite limits to the dimensions of parcels of this kind; but, should the weight exceed 5 arrobas and 5 libras (about 138 pounds), to the current price of portage will be added $1.60 for any excess in weight under 1 arroba, $3.20 for the second arroba in excess, $6.40 for the third, and so on in geometrical progression for every additional arroba or fraction thereof.

Good porters carry 250 pounds with ease, and loads of 350 pounds are not unusual.

Glassware, lamps, and similar articles are frequently packed in barrels and carried by porters. Packages of excessive weight which can not be broken, such as pieces of machinery, pianofortes, etc., are secured to two stout bamboo poles and carried by porters, the poles resting on their shoulders. This form of conveyance requires one porter for every 3 arrobas (about 79½ pounds), and is very expensive.

DUTIES ON PACKAGES.

All customs duties in Colombia are charged on gross weight, according to class, no allowance being made for the weight of the packages.

The packing that I have endeavored to describe is calculated to insure the safety of the goods and to reduce the tariff cost, as well as the very expensive overland freight, to a minimum. Though the rules that I have given have special reference to the department of Antioquia, they are applicable to all inland districts of Colombia.

American packing is, as a rule, extremely defective; so much so that goods that compare favorably in price and quality with similar articles from Europe reach this country so heavily handicapped by the needless expense imposed on them by defective packing that successful competition is out of the question. It not infrequently happens that an American packing case represents more than half the gross weight of the package.

THOMAS HERRAN,
Consul.

MEDELLIN, *September 28, 1893.*

PANAMA.

EN ROUTE FROM THE UNITED STATES.

American goods reach this district from New York by the Colombian line—old Pacific Mail—and from San Francisco by the Pacific Mail Steamship Company and the North American Navigation Company, at an average of some six steamers per month from San Francisco and four from New York, not counting the tramp steamers, which are very few, however. The goods transported by these vessels are all handled by American crews, and while in transit over the isthmus are under American supervision, so far as handling is concerned. However, nowadays, since work has stopped on the Panama Canal, the great bulk of the goods brought is, so to speak, in transit from the east to the west of the United States and vice versa.

UNLOADING AND LANDING.

At the port of Panama the goods are taken from the steamers and put into lighters belonging to the Panama Railroad Company and towed to the wharf by means of steam tugs. They are put immediately on the cars from the lighters.

WAREHOUSING.

The lighters are very good, and the wharf is under roof; a double railway track runs from one end of the wharf to the other, and the goods are practically safe when in the lighters. The steamers are anchored at the island of Naos, some 4 miles from the wharf. Such goods as come from San Francisco for ports on the South Pacific coast are transferred direct by means of lighters from the American steamers to the British and Chilean steamers doing traffic with those ports. No regular line of steamers runs further south than Panama.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior from this port by means of schooners to Agua Dulce, Montigo, Pedregal, and Elgago. At each of these places there is a wagon road extending to leading settlements, and no mule packing is necessary; so that, so far as this port is concerned, it matters not how the goods come from the United States, so they are well boxed up and made impermeable to the rain and dampness, inasmuch as they become exposed to great moisture once on board the schooners and on the wagon roads. If goods are packed in the United States for the purpose of having them carried on mule back, the packages should not weigh over 125 pounds, as one package is put on each side, thus making the load 250 pounds.

OUTSIDE PACKAGES.

The best material for outside covering is waterproof cloth or substance for all textile fabrics, shoes, etc. It is indispensable that the outside covering should be perfectly water-tight, and even air-tight, so as to prevent, not only the rain, but the dampness from permeating the goods. The packs are unloaded at noon and night, and the muleteer is not particular as to whether the packages fall in the mud and water or not; the packs drop where the mule stops. However, as intimated before, there are hardly any goods coming from the United States to this port intended for mule packing.

DUTIES ON PACKAGES.

There was a time when Panama was a free port, but it is not so to-day. Duties which are practically prohibitory are charged on meats; a barrel of imported meat is weighed and duties paid on the weight of the barrel, as well as on the contents. I know of no substitute for the barrel for the packing of salt meats, unless it be tin, and then, of course, the packages would have to be smaller. American meat was a great staple here previous to 1889, when the duty was imposed; but since then the importation of meats has been greatly reduced. Hams and bacon enveloped in canvas are imported, but in this climate only small quantities of pork are consumed.

Duties have been imposed since 1889, not only on meats, but also on wines, spirituous liquors, and tobacco, whether in the leaf or manufactured. The cigarette has, by a decree of recent date, been practically excluded.

All other goods, with the exception of those above enumerated, are not subject to duties. However, salt and ice have become the privileges of special Colombian monopolies, which means that none is imported, unless it be a small quantity of table salt in packages of little weight.

AMERICAN VS. EUROPEAN TRADE PRACTICES.

In conclusion, I beg to call the attention of manufacturers of textile fabrics to the fact that the French, English, and Germans cater with intelligent assiduity to the native trade of this country, even to the extent of having a certain number of yards in the bolt and a certain width to the cloth, as well as in the packing of the goods; the Americans do not, regardless of the many reports made by United States consuls to the Department on the subject.

VICTOR VIFQUAIN,
Consul-General.

PANAMA, *October 2, 1893.*

SANTA MARTA.

Goods from the United States reach Santa Marta by steamers, and are subject to the usual handling of goods transported in this manner.

They are landed at this port at wharves and seldom by lighters.

The wharves are not provided with any shelter and the goods are exposed to the elements. As soon as the goods are landed, however, they are removed to the custom-house, which is something more than half a mile distant.

Goods for the interior of the Republic do not come this way; they go via Barranquilla.

In levying customs duties, the keg, box, or package is counted as part of the merchandise, and pays the same rate of duty.

VICENTE NOGUERA,
Acting Consular Agent.

SANTA MARTA, *September 30, 1893.*

DUTCH GUIANA.

American goods arrive at this port (Paramaribo) principally by sailing vessels direct.

Goods are landed at the wharves, which are partially covered, and the warehouses of the several merchants are convenient thereto. Cargo is seldom discharged in inclement weather.

Goods are shipped to the interior by small steamers and boats. Most of those sent to the interior, viz, flour, rice, pease, molasses, biscuits, etc., are repacked and are usually put up in 5-gallon kerosene tins, sealed, to prevent damage by insects and water. Most of the mining camps are situated some distance from the water side, and all supplies are carried thither on the heads of negroes. About 50 pounds is considered a fair load for a man, and kerosene tins or gin cases make very convenient packages.

The present manner of packing American goods is satisfactory, and no change is suggested.

No customs duties are charged on packages.

H. LOVEJOY,
Vice-Consul.

PARAMARIBO, *October 25, 1893.*

ECUADOR.*

EN ROUTE FROM THE UNITED STATES.

All goods shipped to Ecuador by steamer from New York via the Isthmus of Panama are landed at Colon and then carried by railway across the isthmus to the city of Panama, where they are transferred by launches to the steamer lying in the bay and brought to this port. Goods coming here from San Francisco, of course, avoid the railway trip across the isthmus, being merely transferred from the San Francisco steamer to the steamer for this port.

There arrive here, on the average, about three sailing vessels every year from New York and San Francisco direct, those from the former port passing through the Straits of Magellan. Lately some direct cargo steamers have also been coming to this port from New York via the Straits.

LANDING AND WAREHOUSING.

All goods arriving by steamer are loaded into launches and brought to the wharf; sailing vessels come direct to the wharf and unload thereon. From the wharf the goods are carried about three-fourths of a mile, on flat cars pulled by a small locomotive, to the custom-house.

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*In transmitting this report, Consul-General Dillard writes: "I submit the following report, relative to the packing of American goods for export to Ecuador, by Isaac Reinberg, a clerk in the consulate-general, who has had many years' experience in trade here."

All goods are warehoused by the Government until dispatched from the custom-house. Those of an inflammable character are stored in an iron building, entirely fireproof, situated some distance outside of the city limits.

EN ROUTE TO THE INTERIOR.

Goods are carried from here to the interior on mule back, each mule carrying 200 to 240 pounds in packages weighing 100 to 120 pounds, strapped on each side of the mule; it is therefore best to give these packages a more or less long, flat shape, as the animals must pass through some very narrow cuts in the mountains. The package should be 3 to 3½ by 2½ by 2½ feet. Of course, some goods can not be put in packages of these dimensions, as, for instance, parts of machinery, plows, etc., but when it is possible goods intended for the interior should be packed in size and weight suitable to mule loading. Where packages are too large to be carried by pack mule they must be carried upon the shoulders of men, which is a very expensive style of transportation. Pianos are always carried in that manner to the interior, but lately these are being manufactured in what might be termed "knocked-down" style (in several parts), and thus can be carried upon the backs of mules. The men, or porters, carrying inland cargo are divided into two sets of some twenty men each, who relieve each other at intervals, but the same men go through to the destination.

OUTSIDE PACKAGES.

Goods packed abroad for forwarding to the interior should be first wrapped in tar paper and then sewn in strong, thick canvas; this should always be done, whether the goods are put up in sacks, wooden boxes, barrels, or bags. When the article is first incased in tin and then packed in a box, such as is the case with kerosene, the tarred paper and canvas wrapping are not so essential; nor with liquids where the contents are in bottles, as with beer, mineral waters, etc. With canned goods, however, it is always best to have the outside covering of tarred paper and canvas, the idea being to have all packages for the interior of the country made as near waterproof as possible. Outside waterproof covering is not necessary for goods for this port; it is only necessary for goods intended to be carried upon mule back to the interior of the country.

As a rule, the goods ordered from abroad for the interior are shipped to some forwarding agency or firm here, who repack the articles in suitable packages. In place of the tarred paper, the large leaf of the tree called in Spanish "bijao" (*Heliconia bihai*), of the banana-tree family, is used. This leaf is strong and entirely waterproof. A canvas covering is placed over this.

DUTIES ON PACKAGES.

Duties are charged upon the gross weight of packages. The box, barrel, sack, etc., should therefore be as light as possible, but at the same time strong. The duties upon the packages, as upon the goods themselves, of course, vary very much, all depending upon the class of goods. In prints, silks, linen goods, and the like the duties would be about 15 to 20 per cent ad valorem, while the part of the duty charged to the packing would be about one-half of that; upon iron goods, such as nails, bolts, etc., the duty upon the package would amount to only about 5 per cent of the whole duty charged; 25 per cent ad valorem may be considered a fair average for duties as charged upon gross weight.

Formerly there was much complaint regarding the manner in which goods from the United States were packed. It seemed always to have been done in a great hurry and carelessly; for instance, driving nails into the goods was of common occurrence. Lately, I am happy to say, such complaints have ceased to a very great extent. The manner in which kerosene, lard, flour, and lamp chimneys are packed can not be improved upon.

Heavy goods should be packed in boxes made of very strong wood and iron hoops or straps should be liberally used. Where the box contains very heavy goods and is of rather a large size, these iron straps should not only be put around the edges, but should also be placed around the middle of the box, thus preventing the sides of the box from breaking open from the weight inside. In packing furniture especially greater care should be taken. The import of furniture into this country from the United States has lately increased very considerably. The purchaser prefers to pay a little more charges for packing, provided the pieces arrive in good condition, thus saving time and expense, which reordering always incurs. The mirrors and marbles belonging to the different pieces of furniture often arrive broken; with a little extra care and the packing of such parts separately they would arrive in good order. Round wire nails seem to be better than the square iron ones for nailing the boxes.

ISAAC A. REINBERG,
Clerk.

GUAYAQUIL, *November 3, 1893.*

PARAGUAY.

ASUNCION.

American goods are not imported into Paraguay in any form, owing to the fact that American exporters will sell only on a cash basis, however good the fame of the buyers in this country may be. Many of the principal commercial houses are now importing from Europe direct on credit of from six to eight months, according to the class of goods imported. I can therefore only give the Department information of the packing of European goods for this market, which is as follows:

OUTSIDE PACKAGES.

Prints come in cases lined with oilcloth, containing twenty pieces to the case, of, say, 40 to 50 yards per piece.

Shirtings come in cases lined with oilcloth, twenty-five to thirty pieces per case.

Cotton goods come in bales lined with oilcloth and bound with iron hoops, sixty pieces to the bale.

Handkerchiefs and hosiery come in cardboard boxes fitted into packing cases lined with oilcloth.

Fine wines—port, sherry, champagne, etc.—come in boxes of twelve bottles each or twenty-four half bottles.

Beer, stout, etc., comes in boxes of 4½ dozen or 9 dozen half bottles.

Table wines (common) come in pipes, half pipes, and quarter pipes, iron bound; French wine in barrels, tops and bottoms cemented and cross-pieced.

Sugar comes in casks of 10 arrobas (250 pounds).

Rice comes in double bags of 8 arrobas (200 pounds).

Blue for starch comes in small boxes of 6 pounds.

Biscuits come in tins of 2½ to 25 pounds each, inclosed in packing case.

LANDING AND WAREHOUSING.

Goods are landed from steamers or sailing vessels into lighters at Buenos Ayres, transported to the Government warehouses, and thence to custom-house, or, if in transit to Paraguay, from warehouse; in this case goods only pay certain charges, but no duty.

In Montevideo goods are put on the wharves direct and thence to custom-house or deposit. If in transit for Paraguay, the goods pay customs charges, but no duty. Arriving in Paraguay, vessels unload alongside wharves; thence the goods go to custom-house, and from the custom-house to the merchants in mule carts.

Goods are exposed to the elements only during transit from vessel to custom-house or thence to merchants or other destination.

EN ROUTE TO THE INTERIOR.

Goods are carted from the merchants to the railway. If destined for the interior where no railways exist, they are sent in bullock carts. No pack horses are used.

DUTIES ON PACKAGES.

Duties are charged only on the contents, allowance being made for weight of casks as marked on outside, as in case of sugar or on bags of rice, etc. Each package should be marked with net weight and weight of package. Dry goods pay duty according to tariff, and the package is not taken into consideration. In a rough calculation, duties reach 100 per cent of value of merchandise.

Wines in barrels pay by measure; in cases by the dozen; spirits the same.

Duties are charged in gold or its equivalent.

EDMUND SHAW,
Consul.

ASUNCION, *September 13, 1893.*

VENEZUELA.

LA GUAYRA.

EN ROUTE FROM THE UNITED STATES.

Most goods from the United States reach this port (La Guayra) by the American line of steamships known as the Red D line, leaving New York every ten days. They are fine passenger ships, transport the United States mails, and are capable of carrying more freight than most of the transatlantic passenger steamers. Mention should also be made of the Dutch West Indian line, from New York to Amsterdam via La Guayra, returning from Europe to New York the same way; a Spanish line from New York via Cuba, one ship each month; an English line of freight steamers to and from New York; an English line from Liverpool to New Orleans via La Guayra, thence back to Liverpool direct; a line of German steamers, which often sends a vessel to New Orleans via La Guayra, returning direct to Europe; and many tramp steamers and sailing ships. In fact, most of the European sailing vessels bringing cargo to La Guayra proceed to the United States; but they go in ballast, there being no cargo for them to carry.

LANDING AND WAREHOUSING.

Since the completion of the La Guayra breakwater by an English company at a cost of about $5,000,000, vessels are enabled to discharge their cargo at wharves, instead of in lighters, as formerly. These wharves are covered by iron sheds, under which the cars are loaded. Good warehouses are provided, and goods are not often exposed to the elements.

EN ROUTE TO THE INTERIOR.

Goods are shipped to most all points in the interior by donkey trains. An ordinary-sized donkey can carry 200 pounds of merchandise over the mountains. Packages of light-weight goods as long as the donkey—say 5 feet—can be thus conveyed, but they should not be longer than 3 feet and ought not to weigh over 100 pounds, if it can be so arranged. These loads are placed on the pack animals in such a way as to be perfectly balanced while crossing the mountains. If the animal is to carry 200 pounds, it is best to divide the load into three packages—one at each side, say of 60 pounds each, and one on the donkey's back of 80 pounds. A donkey can carry a heavier load of heavy-weight goods than of light, bulky goods, as small, heavy goods fit closely to the animal and offer less resistance to the wind. I have seen a donkey carry a load of empty boxes fully three times its own size, but in windy weather such a load would tip the carrier over. A load of hardware weighing much more than the empty boxes is carried much more easily.

Goods intended for seaports or cities reached by the railroads can be put up in as large packages as if shipped to some part of the United States, as they are divided into smaller lots by the wholesale merchants and reshipped.

Goods are transshipped by coastwise steamers and sailing vessels to small towns on the coast and by railroad trains to Caracas, where they are transshipped by the English railway for points within 30 miles south of Caracas, and by the German railway for places 30 miles west of Caracas.

OUTSIDE PACKAGES.

Many merchants here complain of the carelessness of American exporters in packing goods of one class in the same box or bale with goods of another class. In such instances the whole bale is raised to the highest class of goods packed therein and duty charged accordingly. If 10 yards of silk worth $2 per yard should be packed with muslin worth 5 cents per yard, the rate of duty for silk will be charged on the whole bale. One merchant told me of his receiving a shipment of goods of very low class. In one bale was about a dollar's worth of very high-class goods, and he was compelled to pay high-class rates for the whole bale, which cost him more than $800 above the rate he would have paid had these goods been in separate packages according to class.

An importer said to me:

> When we buy your dress goods we do not like to pay dress-goods duty on 200 or 300 feet of American 1-inch pine boards. There is too much box. Pine is too cheap in the United States, but it comes high when we buy your great shipping boxes and pay 3 or 4 bolivars per kilogram for them [duty].

American merchants should remember that duty here is charged on the gross weight of every bale or box, and they should make the covering of goods of the very lightest material consistent with strength. All lumber for boxes and crates should be well seasoned, so as to weigh as little as possible. Goods shipped in a box of dry instead of green lumber often saves the consignee several bolivars in duty.

Dry goods.—These should be packed in bales, with canvas or sailcloth covers, and bound with rope or light-weight hoop iron to hold the bale in shape. No board boxes should be used in shipping dry goods to Venezuela. Dry goods are usually received in large bales by wholesale dealers at seaport and railroad cities; then they are divided into small packages of from 60 to 100 pounds and sent by donkey trains to dealers in the interior. But when packages of these goods are addressed to interior towns direct, they should conform in size to the strength of the animal which is to carry them and should have waterproof coverings. However, but few dry goods are ever consigned directly to interior cities, being for the most part shipped in large bales to seaport and railroad cities, where they are repacked for interior towns.

Groceries.—Groceries intended for retail at seaport and railway cities are often shipped in barrels and large crates; but all classes of groceries, fruits, grains, lard, etc., for the interior should come in packages of 100 pounds or less. Potatoes, vegetables, and fruits can be sent in barrels or crates, which should be ventilated. Wheat, shelled corn, flour, corn meal, oatmeal, bran, oats, and all other kinds of grain should come in 100-pound bags. The bags should be strong, in order to stand the trip over the mountains. A donkey will carry two such bags; a mule will carry three, one on each side and one on its back; even two will go on the back of a large mule, making four for the load. Pickles, fruits, jams, jelly, and all kinds of goods in glass jars are wrapped in straw and packed in wooden crates. Fruits, salmon, vegetables, etc., in tin cans should be sent in crates of thin wood. Crackers, cakes, biscuits, and all kinds of bakery goods for this market should be put up in square tin cans, air-tight, about 5 to 10 pounds in each. Twelve of these cans can be shipped in one crate, and from two to three crates can be carried by a donkey to the interior. A very good and convenient way to send American butter and lard is in tin pails, which are placed inside of crates, two to three such crates to a load. Foreign sugar and salt are not allowed to enter Venezuela. Leaf tobacco is brought here in bales.

Liquids.—Liquids such as wine, beer, ale, whisky, brandy, and all other kinds of liquors are sent in bottles wrapped in straw, packed in crates, each containing twelve bottles or twenty-four half bottles. About three such cases or crates make a load. Common table wines are shipped in barrels and kegs. A great quantity of family or table wine is sold here by the barrel. Much of the wine coming to Venezuela in barrels is bottled here and sold by the bottle. Heavy duties are saved by bringing wine in barrels instead of in bottles. Great profits can, without doubt, be made and heavy duty be saved by shipping all kinds of liquors in barrels, to be bottled in this country. American beer can not be sent here in kegs, as it soon spoils after the opening of the keg; but if there were beer-bottling works here, heavy duties could be saved by shipping beer in kegs and bottling it on arrival. The duty on liquors and beer in barrels is lower than on bottled goods, and the duty on empty bottles is not very high. Liquid drugs are usually sent bottled and the bottles packed in cases and crates; but these and American patent medicines could be shipped to advantage, with great saving of duty, in barrels and kegs, the empty bottles being sent packed in straw-filled crates, to be filled by the wholesale dealers in Venezuela. Petroleum is best sent in 5-gallon square tin cans, packing two tin cans in a thin pine box. Two or three such boxes are a load. Many other kinds of liquids can be sent in a similar manner.

Iron manufactures.—Iron manufactures, such as sugar, coffee, and mining machinery, should be shipped in pieces as small as possible, to be put together here. Most all such machinery needs a crate to protect the more delicate parts. Safes are best protected by padding the corners with shavings and covering the whole safe with canvas. Agricultural implements, carriages, wagons, and carts should be "knocked down," to be put together in this country. Delicate parts should be crated and common parts bound in bundles with canvas over the ends and the parts likely to be scratched. Spades, iron scrapers, shovels, and common garden tools can be shipped in bundles, without crates or covering. Stoves, iron pots, kettles, and all tinware should be sent in 100-pound crates, if possible. Nails, bolts, spikes, and small iron for common use should be sent in slim kegs, such kegs being better adapted for donkey loading. The kegs may weigh 100 to 110 pounds, 2 kegs making a load. Shelf hardware should be sent in pasteboard boxes inside of crates. Barbed wire may be sent on reels, without crates or covering.

Furniture.—This should be "knocked down" before shipping, to be put together here. All looking-glasses, glass, or marble parts of furniture should be taken off and packed separately with great care. Other parts should be protected by shavings and canvas, which, being light, add little to the gross weight of the furniture.

PHILIP C. HANNA,
Consul.

LA GUAYRA, *October 4, 1893.*

MARACAIBO.

EN ROUTE FROM THE UNITED STATES.

The American Red D line of steamers from New York brings by far the greater part of American exports to this port, there being on an average, outside of this line, only about four sailing vessels yearly engaged in this trade, and these small schooners. Formerly all American merchandise for Maracaibo was transshipped at Curaçao; but at present there is direct steamer communication between New York and this port, thus obviating the former necessity of breaking bulk and reshipping. With some exceptions, goods generally reach here in very fair condition, and these exceptions are not due to rough treatment in loading or discharging, but rather to indifferent packing. In a recent report* I referred, in this connection, particularly to kerosene, which frequently arrives in very bad condition, with tins leaking and many even empty, to the detriment, moreover, of other cargo.

Generally speaking, when the packing is properly done, merchandise arrives at this port in satisfactory condition and without noticeable damage from rough handling.

UNLOADING AND LANDING.

At present goods are landed in lighters, but it is expected that before the expiration of two years a system of wharves and moles will be completed which will allow vessels of all classes to discharge directly upon the dock.

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*No. 153, p. 222.

WAREHOUSING.

There are no public warehouses, except the custom-house deposits, and these give very inadequate accommodation when several vessels are discharging simultaneously. There is, however, a large covered wharf of considerable capacity, and the risk of damage to merchandise by exposure to the elements is very slight.

EN ROUTE TO THE INTERIOR.

Merchandise for the interior is first shipped on the lake steamers and discharged at various lake and river ports. Some of these ports have railway connection to certain interior points; beyond these mules and donkeys are used.

No railway extends as yet more than 50 kilometers (30 miles) from the lake or river ports, and, therefore, the greater part of the goods must continue their journey on mule back, as no wheeled vehicles are in use. Packages, therefore, should not be of greater weight than 100 pounds.

OUTSIDE PACKAGES.

When goods are intended for direct shipment to the interior without rearrangement at Maracaibo, it is, of course, well that the packages be waterproof, although perishable articles, such as sacks of flour, etc., are being constantly transported safely. All mule teams are provided with waterproof coverings of skins for each animal, so that the cargo is well protected. As to the character of the receptacle, the question of weight is the most important.

DUTIES ON PACKAGES.

The tariff law in this country respecting receptacles or envelopes of imported goods is very simple, duties being levied upon the gross weight. A common pine box, therefore, together with the iron bands and nails, is subjected to the same tariff as the silks or jewelry it may contain, thus making it a desideratum to reduce the weight of packing material as far as may be consistent with the safety of the goods in transit. The best general rule to be observed by our exporters in packing merchandise of all descriptions is to follow the instructions of the purchasers, which have frequently been ignored with disastrous results. By the observance of this rule, all mistakes will be avoided, and, at all events, the exporter is free of all responsibility.

E. H. PLUMACHER,
Consul.

MARACAIBO, *August 23, 1893.*

PUERTO CABELLO.

EN ROUTE FROM THE UNITED STATES.

All goods from the United States are brought to this port by the Red D line of steamers (the *Philadelphia*, the *Venezuela*, and the *Caracas*), one of which enters this harbor every ten days, each ship bringing a full cargo for this consular district. After being received on board in New York, the goods are not subjected to handling until they arrive in this port.

LANDING AND WAREHOUSING.

All goods are landed on the wharves. The harbor is the best on the Spanish Main.

All cargoes are put in warehouses, and are not exposed to the elements.

EN ROUTE TO THE INTERIOR.

Goods for the interior, after being landed at this port, are conveyed by rail to Valencia, a distance of 35 miles; then by mule and ox carts and on burros (small donkeys) to the interior, and as far as the boundary lines of Brazil and Colombia. There are also a number of small schooners trading on the coast, from the mouth of the Orinoco down to Coro, penetrating the arms of the Caribbean Sea, supplying the demand for American products. After receiving on board the products of that region they return to this port, where the cargoes are sold for American or other foreign account.

OUTSIDE PACKAGES.

The best material for outside covering is canvas for dry goods (it should be waterproof); boxes, kegs, or barrels for groceries and liquors; and strong boxes for iron manufactures and hardware.

In no case should the package exceed 100 pounds; the length should be 2 feet 4 inches and the breadth and height 1 foot.

DUTIES ON PACKAGES.

All customs duties are charged on the gross weight and are about 100 per cent of the original cost. The duty on flour is 3 cents per pound, including the barrel or sack. The best way to reduce such tariff cost to a minimum is to make the package as light as possible consistent with strength and durability. Goods intended for Valencia, where they are conveyed from this port by rail, are put up in large packages, and on their arrival at that place are put up in small packages to suit the mode of transit to the interior. Large packages are also the rule when the entire route is by sea.

WILLIAM G. RILEY,
Consul.

PUERTO CABELLO, *August 11, 1893.*

WEST INDIES.

BRITISH WEST INDIES.

THE BAHAMAS.

EN ROUTE FROM THE UNITED STATES.

Goods reach the Bahamas from the United States by means of sailing vessels and steamers—almost entirely by means of the latter. Nine-tenths of these goods are shipped from New York and are subjected to no handling until they reach Nassau.

LANDING AND WAREHOUSING.

These goods are for the most part landed from the vessels at the wharves, the remainder being discharged into lighters outside the bar and conveyed thence to the wharves.

Warehouses are provided.

EN ROUTE TO THE INTERIOR.

Those goods destined for any of the outlying islands are conveyed thither in small schooners.

OUTSIDE PACKAGES.

It is not necessary that the package should be waterproof. I do not see any difference between the covering necessary for goods shipped to the Bahamas and that for those sent by water from New York to any of our own southern ports. The trade is very similar, and the coverings, size of packages, and weights used in our southern shipments will meet all the requirements of American trade with this colony.

If our exporters will continue to do in the future as they have done in the past, as regards the packing and covering of goods exported to this colony, and observe the requirements demanded of them in our own coastwise trade, the importers in the Bahamas will be quite satisfied.

DUTIES ON PACKAGES.

Custom duties are not charged on coverings in this colony.

THOS. J. McLAIN,
Consul.

NASSAU, N. P., *October 2, 1893.*

BERMUDA.

AMERICAN VS. ENGLISH PACKING.

The people of Bermuda are obliged, on account of the geographical position of the islands, if for no other reason, to depend upon the United States for almost all their supplies. The United States furnish at least two-thirds of the goods consumed. The remainder is brought from England.

As a rule, in shipping goods to Bermuda, the same method of packing as is used for domestic shipment should obtain. Too much attention can not be given to compactness. Where goods are received packed in a bulky manner, taking up unnecessary space in transit, it means a greater cost for freight and, necessarily, a proportionate increase to the retail customer. In some instances this fault with American goods has caused subsequent orders to be made in favor of those of English manufacture.

Take, for example, galvanized wire netting. Both the American and English articles are considered here to be of equal merit. Both are put up in the same length roll (50 yards). Much is used here and much comes from England. There is no reason why all that is consumed here should not be of American manufacture. The English article, however, comes rolled up very tightly, occupies little room, and costs little freight, while that from the United States is loosely wound, takes up much room and costs more for transportation.

EN ROUTE FROM THE UNITED STATES.

Goods reach Bermuda from the United States by sailing vessel or steamer direct and are subject to no extra handling from the time of departure until arrival.

There are only two ports of entry—St. Georges and Hamilton. The latter is the principal one and by far the more preferable, on account of the superior dock facilities provided by the port corporation.

At the present time there is but one regular line of steamers running between New York and Bermuda (those of the Quebec Steamship Company). The steamers of this line leave New York and arrive directly at the dock at Hamilton, where goods are landed under sheds of ample capacity, well protected from the weather. The time occupied in transit is usually about three days, and, owing to increasing business and harbor improvements now under contract, this company contemplates putting on faster steamers.

EN ROUTE TO THE INTERIOR.

Bermuda comprises various divisions or "parishes," including several islands connected by bridges with the main body. Goods destined for any of these divisions outside of Hamilton are reshipped on large sailing boats or transported by drays, in either case the form of outside covering being the same as when received at the dock.

OUTSIDE PACKAGES.

As to the best material for outside covering, it may be said that, owing to the shortness of time in transit, the same rules for packing for domestic trade should be used in shipping goods to the Bermuda markets. This applies, of course, to cases where goods are shipped by steamer, in which case ample facilities are provided for safe stowage, etc.

In case goods should be sent by sailing vessel, as is often done, too much precaution can not be taken by the shipper in seeing that his goods are well stowed, and, in this case at least, waterproof linings should be used where admissible.

Dry goods.—In shipping dry goods for this port the usual case should be used, and, where a great quantity is to be sent, care should be taken that the contents are packed as tightly in the case as is consistent with safety, to the end that freight charges may be reduced as much as possible. English goods received here are found to be highly satisfactory in this respect, contents being condensed in an almost perfect manner. Too much care can not be spent in packing individual packages in a manner as attractive as possible. Boots and shoes, which are dealt in by most of the dry goods houses here, are mostly of English manufacture. Of late years there has been a growing demand for American goods of this class, and it only needs a little energy on the part of American manufacturers to make that demand almost exclusive in our favor. The method of packing boots and shoes for the domestic trade should be used for goods intended for Bermuda. With the exception of more compactness, no improvement is suggested by Bermudian dry-goods merchants as regards packing.

Groceries.—The methods of packing groceries at present in use are satisfactory, with few exceptions. Crackers packed in barrels should be surrounded with excelsior or some other soft material. In handling at the docks and in stowing these goods are often ruined on account of breakage. Some shippers use a cushion of excelsior at one head of the barrel. A good idea, though hardly carried far enough. At least both heads should be thus protected, and, if practical, a thin layer might be placed around the sides of the barrel, thus insuring the good condition of the goods upon arrival. Canned goods may be packed as for domestic use. Salted fish should be packed in drums, boxes, or casks. Yeast cakes should be packed in air-tight boxes of tin, instead of the wooden boxes now in use. This applies to inside packages. When packed in this way the goods keep better, are more salable, and more convenient to handle. For the outside covering the usual wooden case is found to be satisfactory. Teas and coffees should invariably be packed in tin, with an outer covering of wood. Stove polish should be packed in paper boxes for shelf display, and these in turn in wooden boxes. Starch should be packed in cases holding about 40 pounds.

Liquids:—Under this head it may be said that, as a rule, the methods used for domestic packing, as regards outer covering and size, should be followed in the case of goods to be shipped here. In the matter of kerosene oil shipped here in boxes containing two tin boxes each, much fault is found on account of leaky tins. In many instances whole boxes are found almost empty upon arrival. The same may be said of naphtha. This fault should be rectified by the use of heavier tin in the construction of the inner boxes, or at least in the construction of their bottoms. Care should be taken in nailing on the covers of the outside boxes that nails do not perforate the tin cans. Oil shipped in this shape should be stowed below decks when shipped by sailing vessels, as when placed on deck moisture is more than likely to reach the tins to such an extent as to rust and cause leakage. Kerosene oil shipped by the barrel is found to be satisfactory.

Ironware.—In packing ironware much must be left to the good judgment of the shipper. Machinery should be crated or boxed (the latter is preferable) when size will permit. Iron piping, if not too heavy, and tubing should be well fastened in bundles with wire. Hollow ware used for culinary purposes should be nested when practicable and crated if admissible. Stoves should be shipped, if by steamer, without covering. Dealers here say that when shipped without being boxed or crated the goods arrive in good order. If they are packed the charge for covering (which, necessarily, is added to the retail price) often proves an obstacle to sale. Wire netting used for fencing purposes should not be covered, but should be rolled as tightly as possible, in order to decrease freight charges. Galvanized piping (light) should be crated. Piping for stoves should be shipped unriveted, nested, and in crates. Bar and rod iron, copper, brass, and galvanized iron should be bundled with wire without any covering. Galvanized iron in sheets for roofing purposes may be boxed, but if fastened in bundles with iron ribbon will arrive in good condition.

Hardware.—In the matter of hardware, American goods are almost exclusively used. I have conversed with representatives of all of the leading hardware houses in Bermuda, and all express the same ideas as regards the packing of goods of their line. One of them has written me the following letter, which is not only interesting, but contains much information concerning the subject under consideration:

> In answer to inquiry in reference to the packing of American hardware, I will say that I do not think the packing of shelf goods could be much improved on, and I find that Americans pack similar hardware much better and cheaper than the English do. The cost of packing is much in favor of the American article, and I find that packing, or I may say putting, articles in paper boxes for the convenience of retailers adds much to the sale and saves a good deal of labor. You have asked me, "How different kinds of hardware should be packed for this market?" To be brief, I would say as follows:
>
> Shelf hardware should be packed in cases lined with tarred paper, the cases being iron strapped at the ends.
>
> Bolts and nuts should be packed in cases. The large should be wrapped in paper, and the small should be placed in cardboard boxes.
>
> Manure forks, digging forks, potato hooks, rakes, handled hoes, spades, shovels, scoops, etc., should have the metal parts covered with bagging.
>
> Axes should be shipped in wooden boxes, one dozen to the box.
>
> Hatchets, hammers, chisels, hand and rip saws, and all kinds of carpenters' tools should be packed under the above directions given for shelf hardware.

Wooden handles for axes, mauls, hoes, brooms, picks, adzes, rakes, forks, etc., should be crated.

Nails should be shipped in bulk in kegs.

Molding, finishing nails, etc., should come in 1-pound packages, cased.

Screws, the same.

I find that the American catalogues are very much better illustrated than the English, which in many instances give the American goods the preference, although the English goods may often be a little cheaper.

In ordering from the English catalogues, owing to their not being well illustrated and numbered, I often get something entirely different from what I ordered, and in many cases making dead stock.

The English are much behind the times in their illustrations. They furnish the dealer with six or eight little books representing as many different lines of hardware very poorly classified, while the Americans give all in one well-illustrated book, making it easier for the dealer to make selections and also almost certain that he will receive just what he ordered.

In the matter of paints, which are dealt in by hardware dealers exclusively, the English are mostly favored, on account of the manner in which they are packed. Both the American and English paints are received in cases. Thus far both are satisfactory, but, in order that the American paint may obtain a greater sale here, a different individual covering should be used. For paint in bulk (packages of over 2 pounds), sheet-iron boxes should be used in place of tin. For 2 pounds or less, a tin box is satisfactory, provided it can be opened easily and is air-tight. The English box, which is greatly favored here, is made with a top that fits into the box as a cork fits into a bottle, and is not only air-tight, but is easily opened or closed and prevents partly used paint from spoiling. Cutlery should be well wrapped in paper, inclosed in cardboard boxes, and then cased.

Tobacco.—Domestic methods for packing cigars should prevail in the case of such goods intended for Bermuda. Fine-cut tobacco for chewing or smoking should be packed in air-tight tins, on account of the danger of molding if not disposed of at once. The climate here is very severe on such goods, and too much care can not be bestowed in the manner of putting them up. Wooden boxes of the usual shape and size for outer coverings are satisfactory. Cigarettes are more satisfactory to the dealer if in tin boxes. Cigarettes from England and Turkey are sold here in addition to the popular American brands. Goods from both of the former countries are put up in tin boxes, are found more satisfactory, and are ordered in larger lots on this account. As has been said, American cigarettes spoil quickly on account of want of proper packing. If this is remedied, more goods will be used and larger orders given. This is a hint that should be attended to by our manufacturers. The usual case will suffice for outer covering. The present manner of packing plug tobacco is as near perfect as could be desired.

Carriages.—Carriages should, when practicable, be taken apart and crated carefully. Wagons need no covering.

Harness.—Harness should be boxed.

Hats and caps.—Like boots and shoes, but very few American hats are sold here, for the reason that American manufacturers have not urged them upon the market. Straw hats are worn nearly the entire year, and nine-tenths of those sold here are of English manufacture. They are very bulky and, with the exception of outward appearance, are not as comfortable as the ordinary cloth hat. American hats are preferred by the majority of consumers, but, not being able to get them in any variety, the purchaser has to be content with the English article. There is no good reason why Bermuda should not be a good customer for our straw hats, except the apparent failure of our manufacturers in pushing them. Hats and caps should be packed precisely as for the home trade.

Furniture.—Before shipping furniture should be, when possible, "knocked down," in order to save freight. The parts should be well fastened together in bundles and closely crated. When sent whole the employment of excelsior with a burlap covering is advised. Rattan furniture should be crated.

Glassware—Glassware reaches here in the best condition when packed in barrels, plenty of hay or straw being used.

In making this report I have tried to give the general rules which should prevail in packing goods for this market, and in closing I would again urge upon the shipper to pack his wares in such a manner as to save freight and secure the safety of the contents. By so doing not only will mutual satisfaction be the result, but an increase in the use of American goods.

DUTIES ON PACKAGES.

Customs duties are not charged on coverings, the importer merely deducting the cost of packages and paying duty on the value of contents—in most cases 5 per cent ad valorem.

JOHN H. GROUT, Jr.,
Consul.

HAMILTON, BERMUDA, *August 19, 1893.*

JAMAICA.

EN ROUTE FROM THE UNITED STATES.

Goods which are brought to this island by steamship are generally carefully handled. The competition for all freight from the United States is now and has been for some time back so great that the carrying companies have been forced to give every care and attention, and any loss from theft is allowed and paid for if checked and noted before the goods are taken from the wharf. For breakage of fragile goods carriers, as per bill of lading, are not responsible; but masters and officers of vessels generally take precaution in handling such goods.

LANDING AND WAREHOUSING.

Goods are landed in Kingston direct upon the wharf and into warehouses. Consignees have fourteen days free to either pay duty or bond their packages in the bonded warehouse.

As the wharfingers are nearly all agents for the steamship lines which use their wharf, it is their best interest to handle the goods free of all cost or damage, as claims and suits over such are not only expensive, but are apt to lose custom.

At the outports of the island and its dependencies—Grand Cayman, Little Cayman, and Cayman Brac—goods are landed by lighters and then on wharves, where warehouses are provided. At Kingston and at nearly every outport of the island and its dependencies excellent warehouses are provided.

EN ROUTE TO THE INTERIOR.

Most of the imports to the island are landed at Kingston. The bales and boxes are broken up and distributed over the island by rail, coasting steamers, and drays. Dirt roads are excellent, and the ordinary packing for the United States interior trade answers every purpose.

OUTSIDE PACKAGES.

Cases waterproof lined is the best method that can be adopted for packing fine dry goods to insure landing in good order.

A material called Manchester packing, being linen-lined paper, with some composition over it, is used by English manufacturers in shipping goods here. It is said to be cheap and answers all purposes.

Merchants are of the opinion that dry-goods boxes should be either screwed down or banded with tin or wire.

Groceries should be packed in boxes and barrels. Hams should be packed in barrels, with salt or rice husk; fine groceries in wood cases; corn, oats, and wheat in bags; flour in barrels. A very strong material should be used for bags in which corn, oats, etc., are shipped, complaint being made by the merchants here that the material now used is inferior, and that they suffer loss therefrom. Complaint is also made about the way kerosene oil is packed, it being said that fully 10 per cent is lost in transit, owing to poor packing. The tins are imperfectly soldered. Many merchants claim that in some shipments fully 30 per cent is lost. A large amount of this commodity is consumed in this island, and better care should be taken in packing.

Drugs should be packed in boxes and barrels. All packages carrying these articles should be wired or iron hoops used for protecting the articles from being pilfered when in transit to destination.

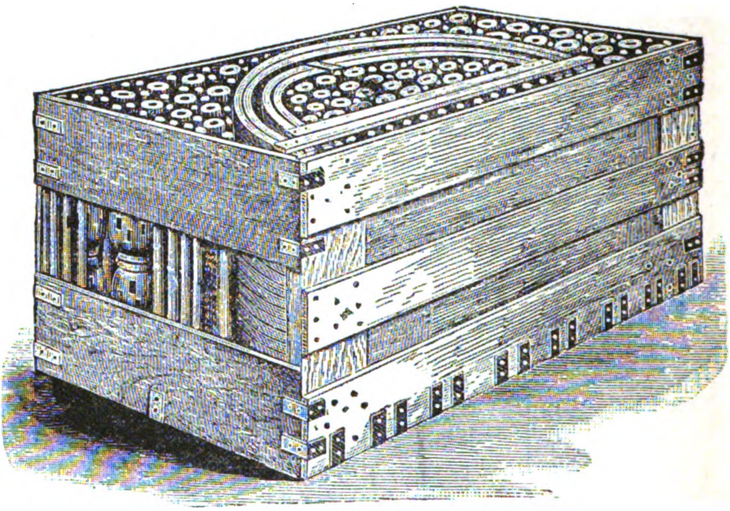
All fine stationery should be packed in wood cases, waterproof lined. Paper and envelopes should be boxed by the 500 in cardboard boxes. The moisture here frequently affects the gum used, hence great care is required. Printing and book paper should be packed in bales, with wood crates for protection.

Liquors should be packed in cases (bottles), or barrels and casks.

Hardware should come in casks for heavy, cases for light, and crates for ornamental, such as stoves, railings, etc.

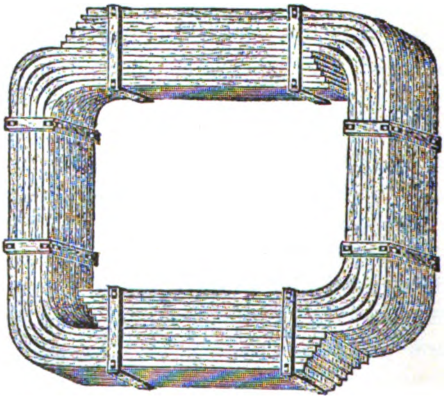
Boots and shoes should be shipped in boxes such as are used for the trade in the United States. The boxes should be nailed or screwed down and banded with tin or wire.

Carriages, buggies, and other vehicles should be packed in close crates or boxes. The cuts following exhibit the method of packing carriage materials for export, which, I am told by an American merchant here dealing in them, can not be improved upon.



The above cut illustrates the manner of packing cases with rims, hubs, spokes, doubletrees, singletrees, and neck yokes for export. Cart or gig rims are cased with buggy rims inside, and the remaining space fill with hubs, spokes, etc.

Wagon and buggy bows are packed in nests, to save in cubic measurement.



For export, when ordered so the widths will admit, bows are packed in large bundles, with the smaller sizes inside the larger ones to save freight. To pack as above, if the bows are three-fourths of an inch thick there must be 1½ inches difference in the width of the bows outside to outside. If the bows are 1 inch thick, there must be 2 inches difference between them.

This mode of packing makes the freight comparatively light. If smaller goods, like whiffletrees, pole yokes, wedges, prop blocks, hair, moss, or excelsior are ordered at the same time, they can be packed inside the bows and freight saved thereby.

In brief, the same kind of covering or packing now in use for the interior trade in the United States for the aforementioned goods and others is all that is necessary for transportation to this island; but extra precaution should be taken that the strongest material is used. Fine dry goods should be waterproof lined; barrels should be securely nailed; boxes screwed down or tightly nailed and banded with tin or wire; and tins in which liquids are packed should be better soldered and water-tight tested before shipping.

DUTIES ON PACKAGES.

Nearly all manufactured goods shipped to this island are taxed 12½ per cent ad valorem, and the size and weight of a package or the weight of covering does not in such case increase the duty. Duties are not charged upon packages, either outside or inside, such as tins containing fine goods in cases or barrels, unless the same be hinged or locked, when an ad valorem duty of 12½ per cent is charged.

AMERICAN VS. ENGLISH INVOICING.

I attach to this report original invoices* of some of the leading English firms, which are said by the merchants here to be model ones. It shows the care and attention English houses give to the slightest detail. First, each package is lettered, numbered, and addressed; second, on the invoice measurements and weights of packages are given; third, contents follow in minutest detail.

To illustrate the value of this, fine biscuits pay 12½ per cent import duty, but the tins are admitted free; thus the English invoices say "2¼ cwts. in twenty-four tins at 1*s.* 2*d.* each," making 28*s.* which are free, while if they were invoiced as so many tins of biscuits at so much per tin, 84 cents would be lost, being 12½ per cent on the tins. If the value of the tins were separated, as is done in the invoice attached, covering being free, 12½ per cent would be saved. Yet I am told that one of our best firms of biscuit manufacturers of New York city make out their invoices at so much per dozen tins. The English firms in making out their invoices separate the covering, and even the price of corks in bottles, from the price of the goods. This may appear petty, but I am told by merchants here that the American mode of making out invoices costs them many extra dollars in duties.

While upon the subject, it may not be amiss to say that a Boston wholesale merchant of this city dealing exclusively in American manufactures states to me that the chief hindrance to the importation of United States manufactures lies in the careless way in which the exporting-house office work is done. Invoices are very carelessly written, technical terms are abbreviated, and the contents of cases not sufficiently declared. The most essential rule of commerce is frequently violated—that a case of goods should be identified by its invoice. It often happens that a case of goods arrives in port the invoices of which are incomplete. The goods are therefore held in bonded warehouses for corrected invoices, causing great delay, inconvenience, and loss to merchants.

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* Filed in the Department.

Other leading merchants of the city tell me that, owing to the careless packing of American goods and the loose and careless way of making out invoices, they save money by buying English goods at a higher price, the English firms having reduced packing, invoicing, and other business minutiæ to a science.

TRADE OF JAMAICA.

The exports of the United States to this island for the year ending March 31, 1893, exceeded those for the year ending March 31, 1892, by $108,767.

The United States is the natural market for the trade of this island, and if our exporters would only adopt the methods of their rivals in packing, shipping, and invoicing their goods, there is no reason why the volume of business with the United States should not be doubled within the next few years. England seeks it, Canada is making strenuous efforts to obtain it, but trade follows quality and price.

Q. O. ECKFORD,
Consul.

KINGSTON, JAMAICA, *August 24, 1893.*

ST. CHRISTOPHER.

EN ROUTE FROM THE UNITED STATES.

Nearly all groceries, provisions, hardware, and dry goods come from New York, lumber and shingles from Washington, Wilmington, N. C., Brunswick, Ga., and Jacksonville, Fla., and are not usually subject to handling en route.

LANDING AND WAREHOUSING.

Goods are landed from vessels at this port by lighters (a distance of 300 yards) to the piers, then railroaded along the piers to the street, then carted to warehouses.

Warehouses are provided, and goods are not liable to exposure for any length of time.

EN ROUTE TO THE INTERIOR.

Goods are shipped around the island by lighters and small sail vessels, and require no change in the usual packages.

OUTSIDE PACKAGES.

The best material for outside covering is the close-woven hemp bagging. However, the outside covering commonly used at New York passes here without criticism. Merchants say the waterproof covering is unnecessary.

As to dry goods, there is no complaint; the usual packages from New York are satisfactory. The goods should be packed in good, strong boxes, well nailed.

Groceries are usually well packed in strong boxes, barrels, tierces, hogsheads, sacks, etc., and when this is done they are received here and handled without complaint.

There is no complaint about the packing of liquids, save that of kerosene oil. It is the unanimous opinion of those who handle much kerosene that the cans should be of better make and the boxes of stronger wood and better nailed together. The merchants say they have no other improvement to suggest.

Iron manufactures usually come packed in such a satisfactory manner that no improvement can be suggested.

Hardware is packed in boxes and crates with straw, and if these boxes and crates have sufficient strength the goods arrive in good condition.

Goods from the United States are very rarely damaged in transit to this island, and when such a thing does happen it is caused by some severe storm at sea, which is, of course, unavoidable.

DUTIES ON PACKAGES.

No customs duties are charged on boxes, kegs, and barrels from the United States; in fact, no cases are dutiable. Hogsheads, puncheons, and tierces are dutiable at 10 per cent ad valorem.

STEPHEN W. PARKER,
Consul.

ST. CHRISTOPHER, *August 15, 1893.*

TURKS ISLAND.

EN ROUTE FROM THE UNITED STATES.

Goods are brought to this district from the United States by American steamers, and, as their owners are responsible for the safe delivery ashore of the goods, they are handled as carefully as possible.

LANDING AND WAREHOUSING.

Steamers anchor about half a mile from the shore, and the goods are landed at wharves by lighters.

Warehouses are not provided, as the goods are delivered to the consignees as soon as they are landed, being conveyed to their stores a few minutes afterwards.

EN ROUTE TO THE INTERIOR.

Goods are shipped to Salt Cay, Cockburn Harbor, and the other Caicos Islands by boats owned chiefly by the consignees of the goods, and are handled very carefully.

OUTSIDE PACKAGES.

Wood is the best material for outside covering. The usual American method of packing goods gives general satisfaction here. I think that the packing of dry goods would be improved if the boxes were lined with some cheap waterproof paper.

DUTIES ON PACKAGES.

No customs duties are charged on the material in which goods are packed.

JOS. L. HANCE,
Consul.

TURKS ISLAND, *November 13, 1893.*

DANISH WEST INDIES.

ST THOMAS.

Goods reach this consular district by steamers and sailing vessels, and are handled by vessels' crews, stevedores, and porters.

They are put into lighters and conveyed to the wharves.

They are carted immediately by consignees to their respective stores. No warehouses are provided in St. Croix, but in St. Thomas private warehouses are established for goods in transit or for reshipment to country of origin.

From St Croix goods are sent to the interior by plantation wagons; but in St. Thomas commerce is confined to the town, the interior being sparsely settled.

Goods reach this consular district in packages as follows: Flour and corn meal in barrels; butter and lard in tins covered with wooden case; pork in barrels; fish in drums, boxes, and barrels; vegetables in barrels; hardware in boxes, kegs, and bundles; kerosene oil in barrels, and tins covered with wooden cases; lard oil, paint oil, engine oil, and all lubricators in barrels; tallow and axle grease in tierces and barrels; dry goods in boxes and bales, with bag covering.

It is suggested that flour barrels equal to the Hungarian be used, as the ordinary flour barrels are considered too slight. Waterproof covering is not considered necessary.

Duties are not charged on packages.

SAML. B. HORNE,
Consul.

ST. THOMAS, *October 11, 1893.*

DUTCH WEST INDIES.

CURACAO.

From information obtained from different importers of American goods at this port, it appears that the present manner of packing meets with the local requirements.

Goods shipped from the United States to this port generally arrive in good condition and are discharged in lighters from the ship's side or landed directly on the wharves, where they are little exposed to the elements. In the rainy season provision is made for covering them.

As this is a small island with no interior shipment, no particular size or weight of package is required.

Customs duties are not charged on coverings.

J. WUISTER,
Vice-Consul.

CURAÇAO, *September 11, 1893.*

HAITI.

CAPE HAITIEN.

EN ROUTE FROM THE UNITED STATES.

For more than ten years steamers have had the monopoly of nearly all the importations from the United States.

UNLOADING AND LANDING.

The goods are landed on the wharf in lighters carrying about 15 tons each, and when it rains they are liable to get wet before they are put under cover in the custom-house. Lumber is generally rafted.

EN ROUTE TO THE INTERIOR.

Goods for the interior are, for the most part, carried on the backs of donkeys and horses in a species of saddlebag of closely plaited straw. One-fourth of a drum of codfish, half a barrel of pork, half a barrel of alewives, or half a barrel of flour, say 200 pounds, put in each side of these large saddlebags constitute a load for a donkey; a horse carries 300 pounds. The saddlebags are covered with oilcloth to prevent the goods from getting wet.

Goods for the interior are also sent in large carts drawn by four oxen. They are sent in bulk. One drum of codfish and 6 barrels of pork or other provisions are considered a load.

Merchandise is shipped to coast towns in small schooners.

OUTSIDE PACKAGES.

As to groceries, liquors, iron, and hardware, no special observation is necessary, as the manner in which they are packed in the United States is satisfactory to Haitien dealers; so I shall confine myself to dry goods.

Amoskeag, Shetucket, all-blue denims, and gray drillings are shipped here in bales, while prints, shirtings, duck, and white cotton goods are packed in cases. Some of these are wrapped in paper, while others are wrapped in oilcloth, especially the dry goods from Europe. Some of the bales are covered with tarred paper or oilcloth, with the view of keeping them dry, which precaution is ofttimes neglected by our American manufacturers.

Again, in Europe they are ever ready to execute an order in textile, design, width of cloth, etc., which is not always the case with the American manufacturers. There is an elegance in certain French designs for prints much prized and sought for in this country, and which should be seen by some of our experts in the matter.

We have two drawbacks against us—the short term of credit which our manufacturers accord and the frequent fluctuations in the prices of dry goods.

All dry goods should be in pieces 25 yards in length or half-pieces 12½ yards long. As they are sold here by the French ell, that will be equivalent to 20 ells, and 10 ells for the half piece.*

DUTIES.

The average import duty is about 40 per cent of the first cost in the United States, the manner or form in which the goods are packed not affecting it.

The import duties on dry goods are affected by their width, *e. g.*, unbleached cotton less than 24 inches wide pays, first duty, 1 cent per ell; from 24 to 30 inches, 1½ cents; from 30 to 36 inches, 2 cents; from 36 to 42 inches, 2½ cents; from 42 to 50 inches, 3 cents; 50 to 60 inches, 3½ cents.

It would be a good plan for our manufacturers to send out a dry goods expert who is likewise a skillful packer; one capable of apprehending all the intricacies of the dry-goods trade of Haiti. In view of its growing importance, Haiti is well worth the additional expense which this measure would require.

The duties would be calculated as follows on 1 bale of unbleached cotton of 25 pieces of 25 yards each and less than 24 inches in width:

25 pieces of 25 yards=625 yards=500 ells, at 1½ cents per ell, first duty	$7.50
Wharfage on 1 bale	.25
Additional duty, 50 per cent	3.88
Additional duty of 33⅓ on $7.75 (first duty)	2.59
Total	14.22

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*To reduce yards to ells multiply by 8 and divide by 10.

On 1 bale of unbleached cotton over 50 inches in width the duties would be calculated thus:

625 yards=500 ells at 3½ cents per ell, first duty	$17.50
Wharfage on 1 bale	.25
Additional duty, 50 per cent	8.88
Additional duty of 33⅓ per cent on $17.75 (first duty)	5.92
Total	32.55

STANISLAS GOUTIER,
Consul.

CAPE HAITIEN, *September 6, 1893.*

PORT-AU-PRINCE.

EN ROUTE FROM THE UNITED STATES.

Goods reach this island by steamers and sailing vessels. The handling and usage are only that to which cargoes so shipped are commonly exposed.

LANDING AND WAREHOUSING.

Goods from steamers are landed from lighters. Sailing vessels generally dock at the custom-house wharf.

Ample warehouses are provided. They are well roofed, but the walls, being arranged for free ventilation, necessary in this climate, expose goods to driving rains.

EN ROUTE TO THE INTERIOR.

Transshipments to the interior are generally made by pack mules. This, however, does not affect the manner of packing of goods in the United States, for merchandise rarely goes to the interior in original packages.

OUTSIDE PACKAGES.

The packing of each class of goods is generally satisfactory. Dry goods might be better protected by the addition of an oilcloth covering just inside the case. There is great room for improvement in the matter of strengthening barrels for flour. Groceries, liquids, manufactures of iron, and hardware have their respective standard packing. The chief consideration, so far as this port is concerned, seems to be the strength of the outside covering.

DUTIES ON PACKAGES.

Boxes, kegs, bags, etc., used exclusively for packing and protecting goods are not subject to customs duty.

JOHN S. DURHAM,
Consul-General.

PORT-AU-PRINCE, *August 29, 1893.*

SANTO DOMINGO.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district by direct steamers from the United States, and are subjected to no handling en route.

LANDING AND WAREHOUSING.

They are landed by lighters and discharged on cars which go direct to the custom-house.

They are not exposed to the elements, as very little time elapses between their discharge and receipt at the custom-house.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by pack animals. The most convenient size of package for pack animals is: Length, 3 feet; breadth, 1 foot; height, 2½ to 3 feet. Two serons weighing each about 120 pounds make a cargo for one animal.

OUTSIDE PACKAGES.

There is some complaint that the boxes containing dry goods are not sufficiently strong to stand the several handlings between shipping point and custom-house here, and they should—if it would not add too much to the cost—be lined with waterproof paper or cloth.

In groceries no change is recommended.

Only a small quantity of liquids is received; its packing is satisfactory.

Iron manufactures and hardware are packed in a satisfactory manner.

The covering is immaterial, as goods, after being verified at the custom-house, are delivered to the owners, who again open and make up in serons for shipment to the interior.

DUTIES ON PACKAGES.

Customs duties are mainly specific, and no charge is made for the package, unless it would serve for other purposes, such as trunks, etc.

THOS. SIMPSON,
Consul.

PUERTO PLATA, *November 7, 1893.*

SPANISH WEST INDIES.

HABANA.

EN ROUTE FROM THE UNITED STATES.

Goods are brought here from the United States either in sailing vessels or steamships. After being loaded in the United States they are not subjected to any further handling until they reach this port.

UNLOADING AND LANDING.

After arrival, entry, and obtainment of custom-house permits, goods are discharged into lighters, if the vessel anchors out in the bay, or over the bow down an inclined plane (wooden staging) connecting the vessel with the custom-house wharf. On the wharf the goods are protected from the weather by tarpaulin or canvas coverings. The same lighters convey sugar, tobacco, etc., from the warehouses to the vessels, into which they are loaded for export.

Coal is discharged either on the Casa Blanca, or the Regla and Habana sides of the bay, at private wharves convenient for distribution. Lumber is either unloaded from the vessel in the bay and rafted ashore by the crew or discharged on some private wharf to which the vessel hauls, such as the San José warehouse wharves, from whence it is carted away to the several lumber yards situated in different parts of the city.

WAREHOUSING.

The custom-house provides a store or warehouse under its own roof for fine goods, such as dry goods, etc., where they are safely cared for till examined, appraised, dispatched, and delivered to the order of importers on their satisfying the duties.

The old San Francisco convent, facing on the plaza of the same name, which now serves as the Habana custom-house, covers from 2 to 3 acres of ground. A part of the custom-house is assigned for the storage of dry goods and other fine goods. If they are left there by the importers longer than the given time for hauling them away after being dispatched, storage is charged at a fixed rate. The custom-house wharf is allotted for the keeping, till dispatched, of such heavy and bulky merchandise as flour, lard, hams, iron manufactures, and hardware unloaded there either from lighters or from the vessels. This wharf is a very substantial structure about 1,500 feet long, 100 feet wide, with an iron gabled shed about 25 feet wide and 22 feet high at the ridge, running midway the full length of the wharf.

In addition to the private warehouses in the city, there are others on both sides of the bay with immense capacity for the storage of goods, such as the Regla, Hecendados, and San José stores.

Heavy goods are not carried into the custom-house store, but are taken charge of on the wharf by receiving clerks, with laborers at their command, who, under the directions and inspection of the customs officials, arrange them in lots in the order of invoice entries and cover them over with tarpaulins. In addition, these goods are faithfully guarded by private night watchmen, as well as by customs guards. Should they be caught on the wharf by a hurricane during August, September, and October, they are liable to be damaged. Proper precautions are, however, usually taken by the importers at that season of the year by hauling them off to the store or warehouse as soon as they are dispatched by the custom-house.

EN ROUTE TO THE INTERIOR.

All goods are forwarded to the interior by railways or coasting vessels and are given good handling and usage en route. From the railway in the interior and from the wharves at the outports, they are transferred to the distributing centers, generally in carts drawn by oxen or mules. In this part of the island pack horses and porters are but little used for this purpose.

OUTSIDE PACKAGES.

Packages of the sizes and kinds adopted by universal convenience and usage, with the coverings judged by the trades from experience and observation to be best, are such as are accepted here. The merchants and tradesmen of Cuba, being among the most practical and intelligent in the Spanish-American countries in their respective branches, are not over fastidious, but readily accept that which by universal custom is acknowledged to be best for the purpose.

Accordingly, dry goods should be packed in wooden cases, properly lined on the inside, and if necessary to preserve the contents from getting wet they should also be covered on the outside with a suitable oiled material.

The most suitable method for packing breadstuffs and provisions for the Cuban market is that now practiced by the American millers and packers: Flour, in cotton or jute bags weighing about 203 pounds gross; lard, in tierces of about 450 pounds gross and in tin cans of about 4, 8, and 18 pounds, with package; hams, in tierces weighing from 350 to 400 pounds gross; bacon (clear bellies), in boxes weighing 500 to 700 pounds gross; beans and pease, in barrels weighing about 300 pounds gross; maizena, in boxes weighing about 20 pounds. All these articles reach here in good condition and are given good handling and usage on the part of those engaged in their delivery for consumption.

About the only liquid imported into this island from the United States is beer in barrels, bottles, kegs, and cases, the latter containing from 2 to 8 dozen bottles, according to mark.

Iron manufactures and hardware are imported from the United States in casks, boxes, crates, bales, and barrels, according to instructions from the importers, except heavy iron pieces, which come loose. All packages should be sufficiently protective of their contents against damage by water; but this does not mean that they should be absolutely waterproof, otherwise there would be no necessity for sheds, tarpaulins, and other coverings.

The present methods of packing American goods exported to this port give general satisfaction.

DUTIES ON PACKAGES.

Duties are not charged on boxes containing dry goods, but on the contents according to tariff rates. A tare of 20 per cent is allowed on tierces containing lard. Sellers give to buyers a tare of 12 per cent on hams for the covering and the outside package. On beans in barrels 10 kilograms are deducted for each barrel. A deduction of 6 per cent is allowed on bacon (clear bellies), to compensate for natural loss of weight. On salt fish 10 per cent is deducted for the drums. Flour in bags of 203 pounds are fixed at 92 kilograms each.

The groceries mentioned above—lard, hams, bacon, beef, and salt fish—are free of duties under the reciprocity treaty between the United States and Spain. Flour under the present treaty pays $1 (Spanish gold) per 92 kilograms.

RAMON O. WILLIAMS,
Consul-General.

HABANA, *September 20, 1893.*

MATANZAS.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district almost entirely by steamship from New York, Tampa, New Orleans, or Pensacola. They are not liable to any other handling or usage than that which is common to all regular steamship routes. On all these routes American goods are handled with ordinary care, and, when properly packed, are little liable to injury except in extraordinary weather.

LANDING AND WAREHOUSING.

As in most Cuban ports, for want of sufficient depth of water at the wharves, steamers anchor in the bay, half a mile or more away, and discharge by means of lighters. This, of course, adds somewhat to the danger of damage by handling and weather, especially as the laborers employed in the transfer are not always the most intelligent and careful.

The only wharf where all goods, save lumber, coal, and bricks, are landed from the lighters is provided with an open shed of ample dimensions for all ordinary importations. This shed has a tight roof and extends to within a few feet of the water's edge. There is little or no danger of damage on account of weather, either in transit, on the lighter, or on the wharf. The lighters are all provided with canvas covers, which can be spread quickly on the approach of a shower.

All goods while in this shed are guarded by custom-house officers night and day. Sometimes in the busy season, which is usually the season when there is little or no rain, this shed becomes crowded and it is necessary to leave machinery, iron pipe, lard, and perhaps some other articles little liable to injury from rain in the open air. I am frequently on this wharf and never see goods that are liable to damage by rain exposed.

EN ROUTE TO THE INTERIOR.

As a rule, goods are shipped to the interior by rail. They are liable to go from this port and from distributing points in the interior short distances by pack mules. Generally speaking, there are no roads, other than the railroad and the mule paths, and wagons such as do the transportation in the towns in the United States away from railroads, are unknown. It is scarcely necessary to have regard for either size or shape of packages liable to transportation by mules. They carry almost anything that can be carried by any means of transportation, and with safety. It is only necessary to keep in mind that the limit of a mule's load is 400 pounds, which must be divided and carried half on each side. The limit of the weight of packages is therefore 200 pounds. There is little danger of damage by rain, as the packages are covered.

OUTSIDE PACKAGES.

The best material for outside covering is that made reasonably secure, tight, and strong for long-route transportation in the United States and Canada, be it bale, box, keg, barrel, sack, or bag. As to packages for goods specially liable to damage by water, it is not worth while to try to make them absolutely waterproof. In this, as in the nature of the package, dealers here tell me it is a question of expense. Competition is sharp, and what they desire is that goods may reach their warehouses as cheaply as possible, and that no unnecessary expense be put into the packing and charged.

DUTIES ON PACKAGES.

Except as to refined petroleum, on which duties are charged for both can and box, customs duties charged on the box, keg, etc., amount to so little that they have scarcely any effect on the cost of goods to the importers. This holds true only of goods shipped in considerable quantities. In the case of a single package, in all classes, duty is charged on the package.

I have not classed goods under separate heads as "dry goods," "groceries," etc., because, as to this port, what is true of one class is true of all.

From all that I can learn after pretty careful inquiry, I should say that about the only caution necessary to be enforced is as to machinery, the delicate parts of which are too frequently broken for want of suitable boxing or casing. Beyond this, goods generally come here in satisfactory condition, and the losses by damage in transit or handling are not such as to justify any considerable increase of cost in packing.

Packages requiring special care, as glass, etc., should be plainly marked "glass" both in English and Spanish.

ELIAS H. CHENEY,
Consul.

MATANZAS, *October 29, 1893.*

SANTIAGO DE CUBA.

EN ROUTE FROM THE UNITED STATES.

All goods reach this port by water, and, after leaving the United States, require little or no handling until they arrive.

LANDING AND WAREHOUSING.

Goods on all vessels drawing over 14½ feet of water are landed by lighters; vessels of less draft are unloaded at the wharf.

Warehouses are provided for goods after landing; consequently they are not subjected to the elements.

EN ROUTE TO THE INTERIOR.

The methods of distributing goods after reaching this port are (1) by small steamers that deliver them at minor points along the coast; (2) by railroads (two in number) that reach 25 miles each to the interior; and (3) by pack horses and mules. A large proportion is conveyed by the last method. These animals carry from 200 to 225 pounds of merchandise, which should be so divided that equal weights may be placed on either side of the horse. The 200 or 225 pounds may be in two or more packages, but should be capable of nearly an equal division. Long packages are not desirable for this trade.

OUTSIDE PACKAGES.

No complaint is made of any form of package provided it be strong and as light in weight as is consistent with strength. There is no necessity for waterproof packages, as goods are not exposed, except those transported on animals, and each horse or mule is provided with waterproof covering.

PULASKI F. HYATT,
Consul.

SANTIAGO DE CUBA, *August 27, 1893.*

EUROPE.

PACKING FOR EUROPE.

The importance of properly protecting American merchandise designed for European exportation and consumption can hardly be overestimated. From personal observation, as well as from reports made by several European importers, I have ascertained that many American products sent to this side of the Atlantic lose very much in quality because of the improper manner in which they are packed. It often happens that the injuries received in transit are considered as a fault in the manufacture of the article, and thus damage is done to American trade.

DRY GOODS.

These goods should be cased in boxes lined with impermeable paper, through which dampness or moisture can not easily penetrate. The size of the case should be of such dimensions that it can be easily handled by two men; for often these boxes are sent inland by diligence or cart, and if the parcel is too heavy it is liable to fall, thereby loosening the nails. The package should be so well braced that it makes no difference whether it is rolled on ends or sides.

The shipper should remember that, in spite of printed precautions, such as "keep dry," "keep this side up," etc., written only in English, the package has to pass through the hands of those who may not even know how to read their own language, and who are pretty certain not to know anything about a foreign language. For these and other reasons all goods should be packed so that the positions of the package will make no difference to the contents. Another matter to be taken into consideration is the fact that the packages may have to lie on an open quay, without any protection whatever from the elements, or be carried in an open freight car through rains and dampness; therefore, the greatest care should be given to protect the contents from exposure. In France all domestic merchandise sent by express is wrapped in waterproof paper, incased often in straw, and enveloped in packing cloth. No tailor would think of sending a suit of clothes by express without carefully wrapping the garments in this manner.

The packing of dry goods in bales is not advised, because there should always be a wooden protection, as well as a waterproof one, for any article liable to be injured by the changes in the weather.

GROCERIES.

If proper care were taken to please the foreign market much more American groceries could be exported to Europe. One of the principal things to be taken into account is the external appearance of the merchandise. In the case of canned fruits and vegetables the aim should be to please the eye as well as the taste; they should be put up in small, attractive packages, running from half pints to quarts. Those of a gallon and more are not easily retailed, except in rare cases to hotels. When tin cans are employed they should have a taking picture of their contents on the outside.

In order to show the value of American products an attempt was made to introduce them into this consular district. Several cans of American preserved fruits were placed with a leading French grocer in Limoges; they attracted considerable attention, and the result is that already this dealer has received orders for a goodly quantity of them.

Glass is the best material in which to pack preserves, but until the duty on glass is removed goods so put up can not advantageously enter France. A prominent dealer in American canned meats said:

> If the exporters in the United States would put up their meats in smaller and more taking packages, there would be a more ready sale for them, because the quality of the goods is superior, but their appearance is against them.

In regard to the packing of dried apples, peaches, and such articles, care should be taken to protect them against moisture. A barrel arrived last week from the United States which was so poorly put together that the head was bulging, one of the staves had a knot knocked out, and mice had ruined the fruit within. "There," said the buyer, "that fruit is better in quality than any other that comes to this market, but the carelessness with which it is put up ruins the sale." Had the barrel been sound and lined with impermeable paper, it is probable that more than twice the amount paid for the extra packing could have been obtained in increased price for the fruit. The cans or small boxes should be securely packed in a large box, so that in the various shiftings incident to a long voyage, with frequent reshipments, the contents would not have space enough to shake and injure each other. To make them snug, hay or some such material should be employed. Excelsior is too much subject to the influences of climate; it either breaks in pieces or swells when moist.

No package should weigh over 200 pounds. A square or rectangular shaped case will occupy the least space and pack the best on ship. The box should not be made of wood too thin, and should be fastened with wire nails.

Dried fruits, such as raisins, prunes, and apples, should never be sent across the ocean in bags, unless whole cargoes are shipped at one time; for when a vessel takes a general cargo it is impossible to tell whether the package next to the sack of fruit will not contain turpentine or some other pungent commodity that will greatly injure the flavor of the fruit. There is much less liability from these dangers if the merchandise is enveloped in impermeable paper before packing it in wooden boxes, while the cost of these extra wrappings is only a trifle.

FLUIDS.

There are only two methods known here of successfully packing fluids—in wood or in glass. Earthenware is much more liable to breakage than glass. In the large wine districts of France, where the transportation of wines, brandies, and liqueurs is an important business, the packing of fluids is reduced to a science. Every bottle is carefully examined before it is used. After it has been filled it is wrapped in tissue paper; then a separate envelope of straw is put on. This "chapeau" gives the bottle a full inch protection on every side. Hay or straw is spread on the bottom and sides of the case as a further precaution against breakage; a layer of the same is, of course, put on the top under the cover. The size of the box is regulated by the number of bottles to be incased—rarely over a dozen in one receptacle. Although the handling of these bottles is rough, the percentage of breakage is extremely small.

When casks are used, they are often inclosed in rough outside casks; hay or straw is packed between the two. If the liquid is of fine brand and high priced, the entire cask is carefully wrapped in straw before putting it in the outside barrel. This not only gives resistance to shocks, but also protects the interior cask from the rays of the sun, which would have a serious effect upon the contents.

The only barrels of American make that attract attention or that are admired in France are those used for petroleum. Were the same care given to the packing of other exports, in all probability the sales would be increased. Bottles have been sent from the United States simply packed in sawdust.

IRON MANUFACTURES.

By the term "iron manufactures" it is presumed that only the larger articles made of this metal are intended, such as steam and horse power machines. Large castings should be boxed after having been wrapped in hay or straw. All bearings should be well protected against rust, and care should be taken not to make the packages too heavy. In the great iron works at Zurich, Switzerland, and Hoboken, Belgium, all kinds of iron work is made for export to Africa, to South America, and to Russia. No parcel weighs over 200 pounds, and each piece is carefully packed. It seems that almost more care is paid in these works to the packing than to the manufacture of the articles; consequently, every part reaches its destination in good order, and the breakage is insignificant. The failure to protect a small part of any machine may ruin important sales abroad. The native competitors are glad to find all the fault possible with foreign machinery.

An American cultivator has been seen with its shares so rusted that they held the soil, making double work for the horse. This style of machine had won the prize at many fairs, but utterly failed to do good work. The implement was not at fault. If it had been properly protected in its trip across the ocean to its place of destination, it would have given satisfaction to the purchaser, and many more could have been sold.

HARDWARE.

The thousand and one little articles that are finding their way into Europe from the United States have great advantage over those made in other lands in their quality and their general make-up. They have been well described by a French engineer, who remarked that for "utility, ease of handling, and practicability American tools could not be excelled." Yet planes, saws, hatchets, shovels, rakes, etc., come to France in a miserable condition. Many are rusty and battered, looking as if they were second-hand tools. This is all owing to poor packing. American pitchforks have gained an enviable reputation, but tying a dozen of them together with a stout string at either end to make an ocean journey is a sure way to lose the trade; the tines are bent, the handles bent or broken and marred, making their whole appearance against them. The tines of such implements should be carefully wrapped in soft paper, enveloped in straw, and then placed in a sort of crate to protect them from the injuries incident to transportation. Edge tools should also be wrapped in soft paper, and again in waterproof paper, besides being packed in wooden boxes. Rake teeth and agricultural implements generally should have similar protection. In other words, all hardware shipped to Europe should be protected from exposure to the elements. In many instances the merchandise is unloaded on lighters, and not on the quays. Even in large ports where quays and warehouses may be found the expense of storage is so costly that, except for articles that can not stand any exposure at all, they are rarely made use of. The greatest protection given the ordinary run of merchandise on the quays consists generally of a piece of canvas thrown over it. This at best is very little protection from sun, heat, cold, and storms.

The best material for outside covering is wood, and wherever water, moisture, heat, or cold would injure the merchandise waterproof envelopes should be used. In order to secure the best transport on sea, rectangular or square boxes should be employed; barrels and kegs do very well for conveyance by land, because in most European countries the porters are accustomed to handle them, but the former are preferable. The customs duties on all kinds of wrappings, with the exception of glass, are so low as to make no appreciable difference in the price of the goods.

SUMMARY.

As a summary, the following points should be borne in mind:

(1) Every package should be rendered waterproof, unless the contents will not be injured by water.

(2) Wood is the best outside covering, because it protects the goods better than cloth or paper.

(3) The packages should not be too large; 200 or 300 pounds should be the limit of weight for general merchandise.

(4) Articles should be so packed that the turning of the package on end or side will not injure its contents.

(5) Every direction and address should be written in the language of the land to which the goods are sent; and if they are to be transshipped through intervening countries, where different languages are spoken, the instructions for the safe delivery of the merchandise should be written in those tongues also.

(6) Too much care can not be taken to present a neat, compact, and secure package, able to resist the severe handling to which it will be subjected during transportation.

WALTER T. GRIFFIN,
Commercial Agent.

LIMOGES, FRANCE, *September 2, 1893.*

AUSTRIA-HUNGARY.

TRIESTE.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach this consular district either via British or Italian ports, or directly by ship or steamer, the latter only intermittently. When transshipped at British or Italian ports, the goods are frequently rather roughly handled, and if packages be weak they are likely to suffer.

LANDING AND WAREHOUSING.

Goods are landed at this port at wharves.

All goods likely to suffer by exposure to the elements are landed in warehouses.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by rail, and mostly on through cars, so that the merchandise is seldom subjected to handling en route.

OUTSIDE PACKAGES.

As a rule, the packages at present used are fairly well adapted to contents, though it would be a great improvement were they more solidly put together. It is not necessary for packages to be waterproof.

In the matter of raw cotton, which forms a large item in the imports into this district from the United States, it must be said that the packages are most insufficient. This leads to great loss of cotton during the different handlings. In addition to this, by the time the goods are landed here, the distinguishing marks are frequently obliterated, which leads to trouble and expense and frequently to lawsuits.

A large quantity of resin is also imported in barrels which are generally in very bad condition; a large proportion arrives in staves, the contents being scattered about the holds.

DUTIES ON PACKAGES.

No duties are charged on packages as such, viz, barrels, boxes, and bales.

JAMES F. HARTIGAN,

TRIESTE, *September 14, 1893.* *Consul.*

BELGIUM.

ANTWERP.

EN ROUTE FROM THE UNITED STATES.

Merchandise coming from the United States to this consular district (which comprises the city of Antwerp and a small surrounding territory) is landed from steam and sailing vessels immediately in the city of Antwerp.

Among the many lines of steamers bringing goods to this country and port may be mentioned the Red Star line, which runs a freight and passenger steamer once each week between New York and Antwerp, and the same kind of a steamer twice each month between Philadelphia and Antwerp, which sails under the American flag.

UNLOADING AND LANDING.

Iron manufactures and all other shipments coming from the United States to this port are landed on the docks from the vessel by means of hydraulic cranes or derricks. The docks are constructed of solid stone and cement immediately along the right bank of the Scheldt. The Scheldt has been deepened and cleaned to such an extent as to permit the largest steamers to rest lengthwise along the dock, thus coming in easy reach of the cranes or derricks. The box, bag, clamp, or whatever is necessary to unload each particular class of goods is lowered into the hold of the ship, suspended from the upper or higher end of the derrick. The goods are raised from the hold by the derrick, are swung around to the solid ground just at the edge of the warehouses, lowered, and, finally, carried into the warehouses by the dock hands.

The magnitude and solidity of the Antwerp docks, the depth of the river, and the system of hydraulic derricks are said to make the port of Antwerp one of the finest in the world.

WAREHOUSING.

Goods are never exposed to the elements after being taken from the vessels. The warehouses stand along the river bank not more than 25 feet from the outer or river edge of the docks. All goods are taken from the hold of the vessel by means of the derricks or cranes above described and are swung immediately around to the entrance to the warehouses, into which they are put at once by the dock hands.

These warehouses are models of their kind. They stand for thousands of feet along the river front, as well as along the numerous basins or canals, from which vessels are also unloaded. They are constructed of iron and glass—iron frame and glass roofing—thus making an absolutely fireproof lodging place for all goods. The floor is simply a level, stone pavement made of small cubic blocks of stone or granite about 8 inches square (Belgian blocks). These warehouses are connected at the lower end of the roof of each, thus affording a continuous system. They have open sides, giving the appearance of a long, single shed.

EN ROUTE TO THE INTERIOR.

In shipping goods to the interior, either to parts of this consular district outside the city of Antwerp or beyond, no pack horses or porters are used. There are in this district only villages and a few large towns, all of which are reached by railroads. One railroad track runs just along the docks between the warehouses and the river's edge, and cars are there loaded with the heavy goods by means of hydraulic derricks. At the rear of the warehouses—*i. e.*, at the end furthest away from the river front—is a series of railroad tracks, where lighter goods are loaded for shipment to the interior, just as they are in the United States, by longshoremen or hand trucks, or both. On the whole, I should say that the system in vogue here of reloading goods for shipment to the interior is most admirable.*

OUTSIDE PACKAGES.

Iron manufactures.—Agricultural implements, sewing machines, and a few patented articles (such as steam economizers, special band saws, etc.), are the principal imports of iron goods into this district. The best material for outside covering is a wooden crate, cut and fitted to the size of the article imported. The crate is preferable to the box, because it is cheaper to the American shipper and quite as satisfactory here; it is more easily handled, and the tariff—which is about 10 per cent ad valorem—is more easily determined, because the object can be more readily seen, thus avoiding the waste of time and money necessary to unpack and repack. Smaller agricultural implements, such as hoes, shovels, etc., can be best shipped loose, a portable lot being simply tied together, but well protected. As to the package being waterproof, I am informed that it is unnecessary. While it would doubtless be better to keep all iron manufactures perfectly dry, thus avoiding any chance of rust, I am informed that the expense incurred in doing this, as well as the very rare complaints arising from the absence of this precaution, make it useless. The ship company carrying the goods is always liable for any damage arising from this or any other cause during the passage across. There is no duty or tariff of any kind charged on the materials with or in which iron manufactures are packed.

Liquids.—The following liquids are exported from the United States to this district: Petroleum, lubricating oils, turpentine, whisky, Florida water, patent medicines, and a few others. Petroleum is best sent in bulk in special tank steamers to be barreled here. Lubricating oils are best packed in barrels, known in the United States as petroleum barrels. Turpentine is best sent in barrels. Whisky is not received here in large quantities, and unless so exported it is, I am informed, cheaper to bottle and pack in wooden boxes with fine straw or sawdust. Patent medicines, etc., are generally best sent in bottles packed in sawdust. All the above liquids, except whisky, are free of any duty, as are the materials in or with which they are packed. Whisky is subject to duty, but the bottles or barrels in which it is packed are not.

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* The consul at Ghent, however, writes: "Merchants here complain that in many instances their merchandise is discharged from the vessel at Antwerp on quays where there are no railway facilities, thus necessitating extra expense for carting in the transshipment."

Provisions.—Bacon, sides, hams, and lard are imported into this district in considerable quantities. Bacon and sides are best packed in wooden cases or crates; hams in barrels. Lard in large quantities can be more cheaply sent in wooden tierces, and smaller shipments can be profitably shipped in closed tubs or pails. There is no duty on provisions.

Grain.—Grain is the largest and most important export from the United States to this district. The varieties are wheat, corn, and oats. If sent in bags or sacks, they should be made of a strong, coarse quality of jute, to resist the attacks of rats, moths, etc., and to avoid being easily rent or torn. These cereals are best sent, however, in bulk, *i. e.*, turned from the grain elevators direct into a part of the vessel prepared for their reception. This latter method is the one, I am informed, most generally in use, and, while being cheaper to the American exporter, gives entire satisfaction to the importer here. Every precaution is provided to prevent losses from waste or from contact with water, and, though claims for losses are not infrequent, they do not occur so often as when the shipments are made in the jute bags or sacks. There is no duty on grain of any kind, nor on jute bags used as covering.

Flour.—Flour is also very largely imported into this district. The best way to pack it is in coarse cotton sacks, as they are more impervious to water and moisture than wooden barrels. There is no duty on flour, nor on the material with or in which it is packed.

Cotton.—Some cotton comes from the United States to this district. It is packed in the usual way—hemp bagging bound with iron ties and the whole compressed. The method is satisfactory.

Tobacco.—Tobacco also enters this district, and is best packed in large, wooden hogsheads.

Oil cake.—Oil cake comes packed in coarse jute bags, though I am informed that wooden hogsheads would answer the purpose well and would probably be a little cheaper.

Woods.—Various woods are imported from the United States, chief among which are cedar, oak, cypress, and walnut. They are best sent in logs.

Resin.—In small quantities resin comes best in barrels made of wood.

All the above articles are free of duty, except tobacco, and also all the materials (including those of tobacco) with or in which they are packed.

In conclusion, I may say that conversations with many importers and steamship people satisfy me that American packing is done in a very satisfactory manner, so far as concerns the importers and shippers here, and it seems to be their opinion that in nearly all cases it is done in as cheap a manner as possible.

HARVEY JOHNSON,
Consul.

ANTWERP, *August 24, 1893.*

BRUSSELS.

EN ROUTE FROM THE UNITED STATES.

American goods coming to the Brussels consular district are generally brought by steamers of the Red Star line, sailing weekly from New York and Philadelphia, and sometimes via England; but in either case they are received at Antwerp, unloaded from the vessels directly at the wharves, and thence distributed to final destination by rail or by canal. After leaving the United States, the journey being entirely by sea, goods receive no handling en route.

LANDING AND WAREHOUSING.

Goods reach this consular district from Antwerp by rail and canal. Commodious warehouses are provided here for the reception of goods coming from all foreign countries. As the warehouses are both fire and water proof, goods stored therein are completely protected from the elements. Goods arriving by rail are carefully unloaded from the cars by men employed by the railroad authorities for this special work. The handling is conducted under a most admirable system—no haste or confusion, as time is of no consequence in Belgium. The same leisurely and careful system obtains with goods arriving by canal, except that the unloading is conducted by hydraulic cranes and derricks instead of by men.

As far as I am able to ascertain, there is no locality in this consular district where goods are transported otherwise than by rail or by canal.

In reply to a written communication addressed to Mr. G. W. Sillcox, a large importer of American manufactures, such as agricultural implements, machines, and tools, as to the most desirable manner of packing goods coming from the United States to this country, he says:

> In our line of goods we require all large machines to be sent out in a "knocked-down" state, making no package that will weigh over 1,000 pounds. When implements are shipped, they should be carefully cased in such a manner as to have them arrive at their destination in complete lots; but it does not matter if they are assembled together in a number of cases. It should be borne in mind, however, that the different cases contain a specific number of machines or implements complete. The goods should be packed with the understanding that all the different countries allow only 15 per cent for tare, and that all the principal ports on the continent of Europe have bonded warehouses where goods may be stored at very moderate prices. Each package must have the accurate net weight and cubic measurement made up, giving the contents of each case on a separate sheet, and this manifest must be certified to as being manufactured in the United States, by such a firm, by the chief of police in the city where the goods are made, bearing also the seal of the police officer. It would be impossible to give details as to how goods should be packed and shipped, as every different implement requires different treatment; but the essential points to be impressed upon a shipper are to see that his goods are packed close in order to gain as much as possible in the cubic measurement and to be accurate in giving the net, tare, and gross weights, together with the cubic measurement, and to make this up on a separate sheet or manifest covering all the details of each shipment and giving all the marks.

OUTSIDE PACKAGES.

It is very difficult to determine what is the best material for outside covering, in view of the variety of goods coming from the United States to this country. Importers express themselves as indifferent concerning the material used, requiring only that the goods be delivered to them in prime condition. There are no customs duties charged on boxes, kegs, etc., used as outside coverings; but, as only 15 per cent is allowed for tare weight, goods should be packed so as to gain lightness and strength.

Agricultural implements and machines are sent over in a "knocked-down" state in crates and cases. Carriages are also sent over in the same manner, similar parts being bound tightly together. Toys are imported in light, wooden boxes. Dental supplies come in half-inch wooden cases of various dimensions, the cases being previously lined with strong, tarred paper. Compressed paper pails are imported by dozens in crates.

I may add that there are but few persons here dealing in American commodities, and but one or two of them are direct importers, the rest buying such goods as this market demands from importers in England and Germany. While expressing an indifference as to manner of packing, they are unanimous in declaring that if exporters from other countries displayed the same careful attention in packing their manufactures as is exercised by the American exporter, they would be entirely satisfied.

In a large factory in this city corsets are packed as follows: Each one is separately packed in a neat, pasteboard box, bearing the manufacturer's labels, number, and quality. One dozen such boxes are put into a large, pasteboard box made expressly for that purpose, and thirty-two of the large boxes are packed in a three-fourth-inch wooden case. The cases are made with crosspieces and lined with waxed linen and packing paper. The capacity of the wooden packing cases varies from 15 to 40 dozen corsets.

GEO. W. ROOSEVELT,
Consul.

BRUSSELS, *October 23, 1893.*

GHENT.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district from the United States in several ways, the largest portion being imported at Antwerp. Cotton and lumber generally come direct via the Terneuzen-Ghent Canal in sailing vessels or steamers. Some goods are imported via English ports, such as London and Hull, which have steam communication with Ghent. Others are purchased of importing houses established in London and elsewhere.

Cargoes shipped direct to Ghent in average-sized vessels are rarely subjected to any handling en route. Instances have, however, come to my notice where vessels arrived at Terneuzen too heavily laden to pass the locks, which, unfortunately, do not permit of the safe entrance of those drawing more than 17½ feet of water. In such cases the cargo was, necessarily, partially transferred to lighters, thus causing considerable delay and expense. Aside from this difficulty, the direct route to Ghent is the cheapest and easiest way of introducing goods into this district, of which Ghent is the best distributing center, either by rail or water.

Goods arriving at Antwerp for the account of merchants at Ghent are at once transshipped either by rail, as in the majority of cases, or by canal boat, and are not again handled before being discharged at destination.

Merchants here complain that in many instances their merchandise is discharged from the vessel at Antwerp on quays where there are no railway facilities, thus necessitating extra expense for carting in transshipment.*

UNLOADING AND LANDING.

At Ghent goods are landed from the vessels at wharves.

The following extract from a circular issued by the Chamber of Commerce of Ghent gives information concerning the unloading and landing of goods at this port:

> Ghent, with its large factories, its important commercial houses, and its population of 200,000 inhabitants, is, by its topographical advantages, one of the most favorable centers for the development of industry, commerce, and navigation and offers immense facilities in the way of transport.
>
> Two large rivers—the Scheldt and the Lys—meet here, and, supplemented by several canals, form the water ways of the two Flanders, Hainaut, and the north of France.
>
> The Belgian Government and several private railway companies have made Ghent the starting point of lines to all parts of the Continent. It is one of the most direct routes from the sea to northern France, southwest Germany, Alsace-Lorraine, Switzerland, and Italy.
>
> The port is capable of accommodating vessels up to 2,500 tons burden, and for a number of years several services of steamers have been plying twice a week between Ghent and various English and Dutch ports.
>
> Spacious sheds and appliances of the most improved kind have been erected along the quays. Ships can discharge direct on to railway truck or cart, into entrepôt, on to quay, or under the sheds.
>
> Movable cranes, lifts, and all appliances necessary for speed and economy are at the disposal of the trading public, as are also the sheds and bonded warehouses. Dry docks (426 feet in length and 42 in breadth) are in course of construction.
>
> The water in the old dock, the timber dock, and at the "avant port" is on the same level; these docks are very spacious and offer every facility and security for the maneuvering of ships.
>
> The navigation, pilotage, police, railway, and customs offices are all on the dock, and the authorities make a duty of affording all possible advantages and facilities to the shipping trade in general. Old and well-established commercial houses, ship brokers, and forwarding agents exist on the spot.
>
> The only compulsory taxes for vessels are dock dues, which are very moderate. No other tax or duty is imposed.
>
> The use of the sheds, bonded warehouses, and appliances for the loading, unloading, or moving of goods is optional, and when the same are employed the charges are very moderate.

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*See, however, report from the consul at Antwerp.

The canal which joins the port to the sea is all along 183 feet broad at water level, and offers every security over its short extent of 30 kilometers. It is open both night and day, and navigation thereon is entirely free.

All vessels up to 90 meters (295 feet) in length and 11.5 meters (38 feet) beam and not exceeding 5.4 meters (17½ feet) draft can enter the lock at the entrance of the canal and come right up to Ghent throughout the whole year.

WAREHOUSING.

The wharves are equipped with iron, waterproof sheds. Warehouses are also provided, and the goods are not exposed to the elements. Between the edge of the wharf and the shed there is an exposed space traversed by tracks, along which goods are often deposited for convenience, but in inclement weather they are covered with tarpaulin. Similar precautions are taken at every railway station, and goods en route in open freight cars are invariably covered with tarpaulin.

EN ROUTE TO THE INTERIOR.

There are three methods of distributing goods throughout the interior—by rail, by canal boat, and by carts. Transportation by water is the cheapest, by wagon a little more expensive, and by railway the highest. Circumstances determine the preference.

Belgium presents a complete network of railways. The organization and service, especially on the State railways, are excellent. This means of transportation is the most frequently employed, being the most expeditious.

The system of water ways is also very extensive, penetrating almost all sections of the Flanders. Canals (most of which were constructed centuries ago) and canal-like rivers furnish a very cheap means of transportation for heavy cargoes, particularly those in bulk. The rates are subject to special arrangements. A merchant of Roulers, West Flanders, informs me that he pays for his goods shipped from Antwerp to Roulers, a distance by water of about 75 miles, from 6 to 8 cents per 220 pounds. This distance is covered in three days. The usual tractive power is supplied by members of the boatman's family—male and female—never by animals, and rarely by tugs.

Transportation by wagon, although employed the least, is preferred by country merchants who come to Ghent for their stock of goods. The country being level and the center of all roads being paved with stone blocks, ponderous wagons, heavily laden, can with ease reach the most remote points in the district. There is a regular service between Ghent and several country towns. The rates average 10 cents per 220 pounds for a distance of about 10 miles.

OUTSIDE PACKAGES.

Dry goods.—These goods are largely imported from England packed in bales. Each piece is first carefully wrapped in paper and placed one over the other until there is enough for a bale. Then, to avoid damage in handling, boards are put at the top and bottom and often at the ends. After being subjected to hydraulic pressure the bale is finally covered with bagging, which is sewed up or carefully tied.

Groceries.—Importation from the United States, except of canned goods, is not extensive. Even canned goods, indeed, are purchased in Antwerp. However, considering the importations from other countries, articles such as sugar, coffee, rice—in fact, almost everything except liquids—are received here in sacks, because they are easier to handle and may be loaded compactly in the steamer. Moreover, the packing material is lighter, less expensive, and can be conveniently returned and employed again. Some years ago it was customary to pack many groceries in boxes containing 440 to 660 pounds each, but this practice has been abandoned because the boxes were found to be inconvenient.

Liquids.—These are packed in casks or barrels, according to quantity. No improvement can be made upon the packing materials used by our exporters for this class of goods. Very little is imported in tin cans. As is well known, the tank steamers have accomplished a revolution in the transportation of petroleum, and shipments in barrels are now seldom made to important ports. The system has been extended to inland transportation. Oil on arriving at Antwerp is pumped into canal boats fitted up with tanks or into tank railway cars. It is thus conveyed to the different centers in the interior, such as Ghent and Bruges, in this district, where reservoirs are located into which it is pumped from the boats or cars. Finally, it is drawn off from the reservoir into barrels.

Grain, etc.—Grain comes in bulk; flour in sacks. Bran should also be shipped in sacks. Hay should be well pressed in bales bound with iron hoops.

Furniture.—There is practically no importation here from the United States, but it may be of interest to consider briefly the method employed by the most competent local packers, which, from experience, I have found to be economical and well adapted to transatlantic shipment. Furniture is packed in straw in pine cases, sometimes very large, constructed of thin boards (usually one-half to three-fourths of an inch thick) strengthened by three or four bands of the same wood, which encircle the case. Short pieces of iron hoops are nailed at the junctures of the laths. To prevent displacement of heavy pieces cross sticks are nailed in the interior. Plenty of straw is placed around the goods as a protection against inclement weather.

Iron manufactures.—Large machines, such as looms for cotton mills, often arrive at Ghent from England without any packing except that the projecting points are wrapped in straw. Certain agricultural machines may be sent in this way. Bicycles may be safely packed in strongly constructed crates. Whenever possible, this economical way of packing should be followed. A particular manner of packing is now much employed for sewing machines. The feet are securely attached to a wooden base; straw is packed about the sides and top, and the package is then covered with bagging. Safes and fine stoves are almost invariably packed in cases.

Hardware.—This is generally packed in wooden boxes. Articles of irregular shape, particularly pumps and bells, are sometimes imported from the United States in casks, which offer an excellent resistance. However, they are comparatively little used for this class of goods because of the unavoidable waste of space in packing in the vessel, the freight being charged per cubic measurement. Small articles, such as cutlery, are first oiled to prevent rusting, carefully packed in small, waterproof boxes, and inclosed in the large cases.

Style of boxes.—Merchants here say that they prefer rectangular boxes to the square ones so often used by our exporters, claiming that the former are more easily handled, and that in case of fall the shock is more widely distributed, and hence danger of extensive breakage lessened. No greater precautions need be taken by our exporters to make the package waterproof than would be observed for shipment across the American continent, involving at least one transshipment. Waterproof cases entail extra expense, and, in view of what has been said in regard to warehousing, may in general be dispensed with. Goods are sometimes imported from the United States in zinc-lined boxes. I have, however, seen goods from England quite as effectually protected against damage by the use of thick waterproof paper wrapped about them next to the wooden case. The cost of this paper is insignificant compared to that of the zinc lining. Round nails, made, I believe, of thick wire, are universally used here and are preferable to the ordinary square-edged ones, which are liable to split the wood. I would also suggest that, instead of marking cases for this country with such phrases as "handle with care" and "this side up," the French equivalents "Fragile" and "Haut" be used. More attention would probably be paid to the latter by the freight handlers, whose linguistic abilities are very limited.

EUROPEAN PACKING ADVANTAGES.

I desire to call attention to the curious and perhaps important rôle that this question of packing plays in international competition. The importer must almost invariably pay the cost of the packing. His first solicitude is therefore to reduce this to the lowest figure. The greatest apprehension of the American exporter is and should be for the arrival of the merchandise in good condition, on which future orders in a great measure depend. Assuming that the packing materials are not returned, the problem is therefore to employ those which are cheapest and lightest, but at the same time perfectly consistent with safety.

A leading hardware dealer of this city claims that the American pine used for the cases which he receives from the United States is so brittle, compared, for instance, with Belgian poplar, that the box must be made unduly bulky by strengthening pieces at top and bottom, for which extra wood, size (for vessel), and weight (for railway) the importer must pay. For a very small box he says he is charged $1 and for the average-sized boxes $3 or $4. They are undoubtedly worth this much, but the difficulty is to dispose of them; for, even if the American will accept them back, it is not practicable to pay the freight. To the best of my knowledge, no packing materials except petroleum barrels have ever been returned from here to exporters in the United States. It might be added, however, that enormous quantities of bagging, chiefly from cotton bales, are collected by the rag merchants here and shipped to the United States as paper stock.

On the other hand, all English houses which supply the hardware trade here accept their packing materials in return usually at about two-thirds the invoiced value. The regular steamship lines plying between Ghent and English ports make this feasible by returning packing material free of charge, providing, of course, that it was originally shipped by the same line. In this way the merchant here who has paid $3 for a box loses only $1. At least one English railway company offers the same inducements. A local merchant says that the Paris firm from which he buys most of his stock gives packing materials free of charge and takes them back at a fair price. Taking advantage of this, he recently returned an entire carload of boxes, bagging, and even string, for which he received a considerable sum.

These considerations, at first sight, certainly seem trivial; but I am sure that such trifles often turn the balance against us in the international struggle for trade. Concerted action on the part of our exporters would doubtless secure from such of the transatlantic steamship lines as are under American management facilities for the return of packing materials equal to those extended by the lines above mentioned.

JOHN B. OSBORNE,
Consul.

GHENT, *September 7, 1893.*

FRANCE.

COGNAC.

EN ROUTE FROM THE UNITED STATES.

Goods imported into the consular district of Cognac are, as a rule, discharged either at the port of La Rochelle or that of Tonnay-Charente. Steamers run weekly between these places and Liverpool, Southampton, and Havre, receiving at those ports merchandise discharged by the great transatlantic liners for transshipment to this part of France.

A line of steamers running directly between New York and Bordeaux—La Compagnie Bordelaise de Navigation à Vapeur—also issues bills of lading for goods invoiced to Cognac or vicinity; and in this case such merchandise, after being discharged on the quay at Bordeaux, reaches its destination by rail.

Again, a great quantity of raw material, grain, produce, petroleum, etc., is shipped direct from American ports to La Rochelle by steamers specially chartered for the purpose. The cheapest, most practicable, and expeditious way of shipping manufactured articles or cased goods to this district, however, is undoubtedly via Liverpool, Havre, or Southampton. The rates of freight are not higher than by way of Bordeaux, and the goods themselves do not suffer in any way through transshipment.

WAREHOUSING.

The ports of Tonnay-Charente and La Rochelle are at the mouth of the River Charente, which is navigable up to Cognac. To this latter place goods are brought by lighters towed by tugboats. At all the above-named towns warehouses are built upon the quay or river front for the temporary reception of merchandise required to be kept dry or free from exposure to the elements, and from these warehouses the merchandise may be transferred to covered freight cars and dispatched by rail to almost any town or city in the interior. Breakage of destructible articles through transshipment either by sea or rail is seldom heard of.

OUTSIDE PACKAGES.

Regarding the outside covering or packing, I can indicate no necessary changes or precautions to be employed. Durable casing, bagging, or baling is advisable. It is well to incase textile fabrics and certain sorts of groceries in waterproof coverings; while liquids, hardware, and iron manufactures may be packed in the conventional manner.

DUTIES ON PACKAGES.

The schedule of duties imposed by the French Republic on goods imported into the country is a purely specific one, being so much either per kilogram (2.2 pounds) or per hectoliter (26.41 gallons). In the event of merchandise paying by weight, the net, and not the gross, weight of the article is taxed. Accordingly, American shippers will gain nothing in this respect by seeking to lighten their cases, unless other reasons prompt them to do so.

JOHN PRESTON BEECHER,
Consul.

COGNAC, *August 29, 1893.*

HAVRE.

EN ROUTE FROM THE UNITED STATES.

American wheat, cotton, dry goods, groceries, iron manufactures, hardware, whale oil, mineral oil, cotton-seed oil, etc., come to Havre principally in steamers, while petroleum in barrels, the different kinds of woods and timber for spars, beams, and other purposes are usually landed from sailing vessels. Wheat from the Pacific coast is for the most part brought in sailing vessels.

UNLOADING AND LANDING.

Goods are generally landed from both steamers and sailing vessels at the quay or dock; occasionally, but very seldom, by lighters. The docks at Havre are among the finest in the world; they are solid walls of dressed granite. The "avant port," or entrance to the harbor, embraces a superficial area of water of about 55 acres; its width varies from a minimum of 60 feet at the entrance to a maximum of 900 feet in its widest part. This part of the harbor furnishes fully 6,000 lineal feet of dock wall and a superficial area of space for landing goods of over 10 acres.

In addition to the "avant port," there are nine basins, with lock gates, in which ships drawing from 25 to 35 feet of water may float at all times, regardless of the ebb and flood of the tide, which at times rises to the height of 28¾ feet. These basins, of different dimensions, aggregate a superficial area of water equal to 185 acres and a lineal extent of wall space for docking ships of 35,000 feet. Three of these basins communicate directly, and all indirectly, with the "avant port," or entrance basin. The principal docks are reached by branch railways, so that passengers or freight may be embarked or disembarked at the entrepôts, or warehouses, of the docks. The warehouses and sheds combined contain about 75,000 square yards of storage room, of which 36,000 are under glass. Altogether the warehouses and sheds connected with the docks and in immediate proximity thereto have a storage capacity of 134,000 tons.

WAREHOUSING.

From the foregoing it will be readily understood that warehouses and sheds are provided at most of the quays or docks, under which goods are landed, and therefore they are not liable to be exposed to the elements. There are, however, some open quays, where neither warehouses nor sheds are provided, but these are used for docking vessels laden with such goods as are not readily injured by the elements.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by rail and canal and, to a limited extent, by wagons. The goods are loaded into the cars and canal boats or lighters directly from the warehouses on the docks and transported to the interior, chiefly to Paris by rail or water, as the case may be. Many of the freight cars are open at the top, with closed ends, and the goods are protected by covers of waterproof canvas or tarpaulins. The handling and usage depends in a measure on the nature of the goods; but it may be said, in general terms, that all packages are handled with much more care in France than in the United States, and greater attention is given to proper protection from the elements at docks and stations.. Pack horses are not used for the transportation of goods in this consular district. As a rule, the lighter the package the more careful will be the handling and the more expeditious the transportation.

OUTSIDE PACKAGES.

There is a very general consensus of opinion that perishable goods—that is, fabrics which may be affected by exposure or by sea air or sea water—should be packed in waterproof bales or boxes of not more than 300 or 400 pounds maximum weight. Where boxes are used, there should be an internal lining of metal, gum cloth, oilcloth, waxed paper, or other material impervious to water. In France the waxed paper is preferred to any other waterproof material, on account of its cheapness, lightness, and, above all, its efficacy in excluding moisture. Crates, kegs, barrels, casks, or hogsheads provided with batting or buffer hoops are to be preferred to boxes, however securely constructed, especially for packing china, glassware, or other destructible goods, as the former are not only more elastic and, consequently, more easily broken, but when roughly handled they impart but little concussion to the articles within, and the risk of breakage is proportionately diminished. When goods are transported in sacks, they should be of strong material and double.

While the application of the steam engine to transit by water has accelerated communication and rendered it so regular and certain as to give an extraordinary stimulus to foreign trade, it has at the same time increased the necessity for greater care in the packing of goods for shipment. We are undoubtedly further removed than ever from that reasonable care in handling goods which progress in transportation and civilization would seem to demand, and each year it becomes more and more necessary to devise improved methods of packing to insure against the disasters of careless handling.

It should not be lost sight of that security in the method of packing goods for shipment to foreign markets is to be regulated in a measure by the season of the year at which they are shipped, and also by the description or character of the goods, some articles, such as silks and fine fabrics, cutlery, delicate and highly polished machinery, etc., being particularly susceptible of sea damage, while other articles incur little risk of damage from salt air or water. The former articles should always be enveloped in impervious cloth or wax paper. In the case of machinery, etc., in addition to the impervious covering, the usual precautions are, of course, to be taken against breakage by surrounding the article with adequate layers of cotton batting, shavings, straw, etc.

In connection with the subject of packing American products, I would especially call the attention of planters and cotton factors to the superiority of the bales of Indian and Egyptian cotton as compared with the American bales, and also to the bad practice which is occasionally noticed, and greatly to be deprecated, of mixing up good and bad cotton in the same bale. The Indian cotton is pressed into small, compact bales, securely covered with jute, and wrapped continuously, as it were, with iron bands; whereas much of the American cotton arrives here in very bad condition—the iron bands broken and the bagging torn or otherwise mutilated and often rotten from exposure to the elements or from having lain in water, which causes the weight of the cotton to be fictitiously increased, single bales sometimes weighing 800 pounds. Cotton thus saturated with water and increased in weight is necessarily greatly depreciated in value. The want of proper attention in baling, and on the part of the commission merchant in suffering the bales to get wet, thereby increasing the freight on a damaged article, can not fail to injure the market for American cotton, which will ultimately be seriously felt by planters and dealers at home. It is to the interest of all concerned that this matter should be remedied at once. The careful planter, who pays due attention to the baling, as well as the quality of his cotton, will in the end be properly remunerated, but the slovenly one who mixes good and bad together and does not attend properly to the packing, baling, and shipping of his cotton will only be able to sell in seasons of scarcity and at greatly reduced prices. The utmost pains is taken in the packing of Indian and Egyptian cotton shipped to Europe. Compressing is done by steam compressors, and the bales, which are so securely covered with jute as to be almost impervious to the elements, are fastened with at least two iron bands or ties more than are used on the American bales. On an average, four bales (say 1,568 pounds net) of Indian cotton go to a space-ton of 40 cubic feet; some presses make 100 bales equal to 21 tons measurement. The Egyptian bales are somewhat larger than the Indian, but are equally well wrapped with jute and bound with iron. It is not believed, however, that jute as a covering for bales possesses any special excellence of character, except as to strength and cheapness.

The greatly increased exportation of hay and feeding stuffs from the United States to this port, following the disastrous results of the late drought in western Europe and the interdiction which in a measure has been placed upon importations of hay from the steppes of southern Russia, where cholera and cattle murrain are chronic, raises a question of interest to American farmers and shippers as to the proper method of packing or baling hay to meet the requirements of foreign dealers and consumers. The bales of hay received here are not always what they are represented to be or what they should be, and naturally complaint is made of the fraud. On the outside, as far as can be seen, the hay is good; in the middle it is rotten or of an inferior quality, a condition of affairs which at times has caused the seller at this port great inconvenience and loss—the purchaser in the interior coming back on him for indemnity. This sort of baling can not fail to bring American products into disrepute, and it must ultimately seriously injure not only the producers, but everyone connected with the trade. If the name and place of the press and the owner of the hay were marked on each bale, it would be a step toward the object in view, as the fraud might then be traced back to the proper source; but if an inspector of hay could be established at the place where the bales begin the journey to European ports, it would be a much more effectual protection, and give confidence to the trade. The loss on sales of hay in this district has recently been considerable, and dealers will, in the future, be more particular in giving orders and selecting agents to execute them. Hay has never before come to Europe in such bad condition as it has recently, the bales being badly packed or pressed, and not infrequently in a state of decay. If there were inspectors and proper warehouses at the shipping ports, the factors and brokers would not be able to sell hay in such condition—except at depreciated prices. In regard to the baling of hay in the most convenient method for shipment, all that has been said in regard to cotton, except as to an outside covering, applies equally to hay. The bales should be firmly pressed, and should not weigh over 300 pounds each.

DUTIES ON PACKAGES.

Customs duties are not charged on packing boxes, kegs, etc., unless they are of choice woods intended to be manufactured into articles for sale after they have been emptied of their contents.

The following is the minimum tariff applied by the French Government to certain American products and merchandise per 100 kilograms (220.5 pounds) net weight.

Articles.	Duty.	
	Francs.	
Canned meat	15.00	$2.90
Fresh fruits for family use:		
Grapes of all sorts	8.00	1.54
Apples and pears	2.00	.38½
For cider	1.50	.29
Other	3.00	.58
Dried fruits for family use:		
Figs	2.00	.38½
Apples and pears	10.00	1.93
Almonds and hazelnuts	3.00	.58
Pistachio nuts	50.00	9.65
Other	5.00	.97
Common wood:		
Spars, with or without bark	.65	.13
Large timbers and beams, 80 millimeters (3⅛ inches) and more thick	1.75	.34
Small timbers and beams—		
From 35 to 80 millimeters (1⅜ to 3⅛ inches) thick	1.25	.24
Under 35 millimeters (1⅜ inches) thick	1.75	.34
Cut for pavement	1.75	.34
Staves	.75	.15
Laths	1.50	.29
Hoops	1.75	.34
Firewood	.30	.06
Hops	30.00	5.79
Apples and pears, macerated	1.50	.29

C. W. CHANCELLOR,
Consul.

HAVRE, *August 30, 1893.*
No. 160——9.

PARIS.

VALUE OF PROPER PACKING.

If American exporters fully appreciated the importance of properly packing all goods and merchandise shipped from the United States to European countries the loss arising from breakage and the damage done by exposure to the elements would not only be greatly reduced, but importers on this side would have their confidence largely increased. The result would be a considerable increase in the European demand for the products of the United States.

EN ROUTE FROM THE UNITED STATES.

Goods coming from the United States to France are carried principally by the French Compagnie Générale Transatlantique steamship line from New York to Havre and are generally delivered in fair condition, indicating good usage en route.

WAREHOUSING.

Goods arriving in Paris are placed in warehouses, which are adequate in number, and are not left exposed to the elements. Sometimes, however, in transit by rail from Havre to Paris—the "goods trains" being made up of open cars—merchandise is exposed, and damage is done if proper care in packing has not been taken. Though the handling of all kinds of freight is rough, the damage would be small if the goods were properly and carefully packed.

EN ROUTE TO THE INTERIOR.

Goods are distributed to the interior from Paris by railways. Merchandise is usually conveyed to points not on the lines of railway by wagon from the nearest railway station.

OUTSIDE PACKAGES.

Dry goods.—Especial care should be taken in packing this class of merchandise for export. Bales of cloth, woolen, cotton, or linen, should first be wrapped in tough, heavy paper and then securely and firmly incased in a strong wooden box protected by iron bands at the joints and corners. In the construction of these boxes wire or screw nails should be used, instead of the ordinary iron nails. Merchandise such as boots and shoes, hats, caps, and all kinds of dry goods can be shipped to France with the same safety as to the interior of our own country if more attention is given to the manufacture of strong boxes, and a little more care is taken in the packing.

Groceries.—Canned goods, such as fruits, sirups, potted meats, and the like, exported to France should be incased in strong, wooden boxes with iron bands at the joints and corners and fastened with wire nails. Dried fruits, rice, and the like should be exported in bags made of a very strong or tough material and then enveloped in an outer bag made of coarser stuff. Tobacco, cigars, and cigarettes of American manufacture are to be found in France, even though the French Government monopolizes this branch of business; but the boxes in which they are shipped are so strongly made that even the severest handling and exposure leave the contents intact.

Liquids.—I am told that liquids exported from the United States are, as a rule, delivered in France in the same condition, so far as quantity is concerned, as when shipped. Rarely is any complaint made of leakage. Petroleum and other oils are, of course, shipped in barrels, which are usually of the very best manufacture. Sirups are sometimes shipped in barrels, though principally in tin cans securely packed in strong, wooden boxes. This is the proper way to ship this class of liquids. Whiskies, brandies, and beers, if exported in small quantities, should be put in bottles securely and carefully packed in boxes which contain separate receptacles for each bottle. A number of layers in each box can very easily be made, and, when a bottle or other glass vessel is put into a separate receptacle and then securely packed with straw, excelsior, or other light material, there is rarely any breakage, and if, by reason of rough handling, a bottle should be broken, the others are usually left intact. The loss sustained, if any, is but small if packed in this manner, whereas if glass vessels are packed in boxes without a separate receptacle for each vessel the breaking of one leaves a vacuum and exposes the entire contents of the box to the same fate. In merchandise of this class it is advisable to mark the box "fragile," and exporters from the United States have even taken the precaution to mark in French the word "Haut" for the top and "Bas" for the bottom, which usually tends to secure more careful handling.

Iron manufactures.—This class of merchandise is usually shipped in as small pieces or quantities as possible. Wrought iron, steel, and like metals, if at all fragile, should be securely packed in strong boxes. Heavier irons are usually incased in wooden strips with iron bands for protection against rough handling.

Hardware.—This class of merchandise, consisting principally of carpenters' tools and agricultural tools and implements, should be incased in boxes. No class of hardware should be shipped to France in an open or unprotected state, with the exception possibly of shovels and like tools, which, even when subjected to rough handling, seldom sustain material damage.

From the foregoing it will be seen that the surest and safest way of packing merchandise of any class in the United States for France is to incase the same in strong boxes, and if merchandise is carefully packed so that the entire box is full but little damage need be feared from breakage by reason of rough handling. So far as exposure to the elements is concerned, the loss sustained in this way, when shippers take ordinary precautions, is so small that it hardly needs to be considered.

DUTIES ON PACKAGES.

Specific duties are the rule in the French tariff; ad valorem duties are the very rare exception, being laid only in two or three schedules, and in each of those upon but one or two articles. Commodities are assessed for imposts by weight, measurement, or piece.

The great bulk of manufactured goods, comprising practically all fine and highly finished products and by far the greater proportion of medium grades, are rated by net weight, no duty being levied upon the bales, sacks, casks, boxes, or other coverings. A great many crude materials and some partly manufactured goods are admitted free of duty. Crude materials subject to duty, as well as some partly manufactured articles, and perhaps a few commodities in a finished state, but bulky or heavy, are assessed by gross weight, *i. e.*, including the weight of coverings. Among the commodities so rated the larger proportion are either such as are usually transported without coverings of any kind or those as to which the weight or measurement of the coverings is so small, compared with the weight or measurement of the contents, that the duty levied upon the latter is insignificant in proportion to the tax on the contents. It does not operate, therefore, to appreciably increase the cost of the latter to consumers, and thus to affect the demand. Among the commodities subject to imposts on gross weight may be mentioned cereals, flours, meals, fruits, vegetables, and other foodstuffs in a raw state; raw wool, skins, and hides; timber, manufactured woods; stone, marble, crude minerals, earths, chalk, cement; most metals (crude or in the earlier stages of manufacture, and many in an advanced or a finished state), including iron castings, sheet iron, bar iron, structural iron, iron or steel rails, etc.; pottery, except the finest grades; barks, roots, herbs, juices, and other chemical materials, as well as some chemical products; crude oils, both mineral and vegetable; conserves or extracts of meat (canned meats); concentrated or condensed milk; hard roes of cod or mackerel; tar, pitch, and other resinous products, etc.

Of the commodities thus enumerated, those which are or can be largely imported from the United States are, as will be observed, mainly such as are now transported, when packed at all, in the lightest and most compact packages consistent with safety. Indeed, as already intimated, security is not always enough considered by American exporters in putting up their merchandise for shipment. The chief considerations should, of course, be the protection of the packages against damage in transit and the preservation of the contents thereof in the same condition as when shipped. Subject to these supreme considerations, those who export to France goods whose coverings are subject to duty are recommended to adopt the lightest practicable materials in packing. As already suggested, however, the character of American goods in this category is such, and their variety is so small, that there is little, if any, margin for effective effort in this direction.

SAMUEL E. MORSS,
Consul-General.

PARIS, *October 13, 1893.*

ROUBAIX.

EN ROUTE FROM THE UNITED STATES.

Direct importations from the United States into this consular district are confined to cotton, wheat, flour, and refined and crude petroleum. All other products of the United States of any importance are brought here indirectly, and not generally in original packages. Manufactured products in small quantities are chiefly brought in the district through the agency of Paris firms importing directly from the United States and are distributed through retail houses. There are no firms in this district engaged in general importation of American goods except the classes named above.

The port of Dunkirk, on the English channel, is the only one belonging to the district. It is an entrepôt for petroleum, wheat, and flour from the United States.

LANDING AND WAREHOUSING.

Goods are discharged on wharves or lighters, depending upon whether their transit to other points is to be by canal or railroad. If by canal, they are generally unloaded upon lighters or canal boats, which are towed directly to their destination from the vessel's side. If by railroad, they are unloaded upon quays, where there are Government and private warehouses, sheds, and ample protection from the elements and thieves. The quays are in railroad communication with the stations.

OUTSIDE PACKAGES.

There is nothing of particular value to American merchants which can be said regarding the packing and transport of these products. In general terms, it may be said that petroleum comes in ordinary petroleum barrels, or in steam vessels especially constructed for the transport of petroleum, called tank steamers. Wheat and flour come in sacks of the ordinary size, form, and material.

As to the form and material for cases, packing, etc., which should inclose goods intended for this market, no specific rule can be laid down. The climate, facilities for transportation, handlings en route, etc., are not materially different from those which exist in the eastern part of the United States, and it may therefore be said that the rules by which American merchants are guided in packing goods for transportation to the interior of the country will serve here, consideration being had for those classes of merchandise which are affected by an ocean voyage. If there be any difference in the handling of freight here from that which it receives in the United States, that difference consists in the greater care bestowed upon it here.

DUTIES ON PACKAGES.

In a general way, it may be said that boxes, etc., containing merchandise are not subject to any duty, except in those cases where the value of the covering as an article of merchandise is beyond question or where the covering is inseparable from the merchandise and the latter is subject to a duty upon the weight.

There is no duty upon barrels containing petroleum, but sacks containing wheat and flour are subject to the same duty (by weight) as the contents.

The provisions of sections 105, 106, 107, and 108 of the tariff law of France upon the subject of packing are as follows:

> Exterior or interior packing (cases, casks, vessels, sacks, etc.) which are not in themselves of merchandisable value are exempt from duty when the merchandise contained therein is exempt from duty or when it is subject to a net duty on the value, on the measure, or on the number. When the contents are subject to a gross duty the packing is subject to the same rate. This last ruling is equally applicable to packings having a merchandisable value when the rate of duty upon the contents is not notably inferior to that to which the packings are subject separately. Exterior or interior packings having a merchandisable value are subject to duties under their separate heads under the following conditions: When they inclose merchandise subject to a gross duty notably inferior to that to which they themselves are subject, when they inclose merchandise not subject to any duty, and when they inclose merchandise subject to a net duty by weight, by number, by measure, or by value. This rule has application (1) to vessels of copper or other metal in which are imported oils or essences; (2) to cases or boxes of tin; (3) to sacks when they are of a quality superior to that which is ordinarily used for this purpose; (4) to bars, bolts, and nuts having served in the packing of copper sheets; (5) to morocco boxes or cases or paper boxes or cases covered with morocco inclosing watches or jewelry; (6) to iron bands or hoops which are employed as ligatures to trunks, etc., but only when they exceed in number what may be necessary for this purpose; (7) to leather or glass bottles when their contents are subject to other than gross duties; (8) to carboys and demijohns containing acids; (9) to cardboard boxes containing starch.
>
> When interior packings having a merchandisable value can not be separated from the merchandise they contain, and the value of which is destroyed after the consumption of the contents, and when the packing and the contained merchandise are subject to duties by weight, the said packings are subject to the same rate of duty as the contents, even though they may be separately subject to a higher rate. This rule is especially applicable to coverings of tin containing preserved meats, fish, lobsters, fruits, and vegetables, and applies with the same force to merchandise subject to either gross or net duties. Thus when merchandise subject to net duties have interior packings upon which a separate and lower rate of duty than that which is imposed upon the merchandise itself, those interested have the right to demand, in order to avoid the trouble of making an exact statement of the weight of said packings, that the rate of duty applicable to the merchandise shall be imposed upon the packing. This applies, for example, to tin boxes containing sweet biscuits and to soldered tin cans containing concentrated milk.
>
> The weight of double casks and double casings of all kinds is not comprised in the weight of merchandise subject to gross duties. It is also not comprised in the weight of merchandise subject to net duties and entitled to the benefit of the legal tare, especially when merchandise of this character is entitled to the benefit of special tares on account of the large number of packings. These deductions are allowable only when the interior packing is necessary for the transportation of the merchandise. In all other cases the merchandise will be subject to the same treatment as merchandise in simple packing. This ruling has application principally to liquids imported in bottles which are inclosed in cases.

PRODUCTS SUBJECT TO DIFFERENT RATES.

It may be stated for the benefit of exporters that merchandise composed of two or more materials upon which there are different rates of duty is subject to the highest rate imposed upon any one of these separately. This rule, of course, applies to classes of merchandise not specially designated in the tariff law. There are numerous exceptions which modify it.

Article 117 of the tariff law of France is as follows:

> A product composed of materials or substances subject to different duties, which is not distinctly specified in the tariff, is subject to a rate of duty upon the whole equal to the highest rate imposable upon any one of its component parts, except in the case where these parts may be easily separated from the whole or when they constitute only unimportant accessories to it.

DUTIES ON INDIRECT SHIPMENTS.

Intending exporters to France should take note that with but few exceptions merchandise produced outside of Europe is subject to a higher rate of duty when it enters France through other European ports.

Article 122 of the tariff law of France says:

> Importations from a European country of an origin extra-European are subject to an additional bonded warehouse tax.

The general rule is to subject such importations to an extra duty of 3.60 francs upon each 100 kilograms, which is equivalent to about 33 cents upon each 100 pounds.

STEPHEN H. ANGELL,
Commercial Agent.

ROUBAIX, *November 30, 1893.*

GERMANY.

BRESLAU.

EN ROUTE FROM THE UNITED STATES.

Few business people in this district import direct from the United States, since great facility is offered them to obtain goods at a reasonable price, either in large or small quantities, from importers in Hamburg and Bremen.

EN ROUTE TO THE INTERIOR.

Goods are forwarded from these places principally by rail, but occasionally during the summer months by water (on the rivers Oder and Elbe) in long, flat barges, which are towed up or down by small tugs. In this case the freight charges are considerably cheaper than when the goods are sent by rail, but this process is, of course, a much slower one.

WAREHOUSING AND LANDING.

Safe warehouses are provided everywhere to shelter goods from the inclemency of the weather. On arrival they are retained at the custom-house until the duty is paid and are handed over to consignees in the usual manner. The outside covering (packing) of goods is not dutiable.

OUTSIDE PACKAGES.

As to the modes of packing, I have been told that the following are considered fully sufficient and satisfy all demands of the merchants:

Groceries.—Dried apples, in wooden cases weighing from 50 to 60 pounds or in barrels from 200 to 300 pounds; dried apricots and peaches, in wooden boxes weighing about 25 pounds; Para nuts, in strong, linen bags weighing about 120 or 180 pounds; peanuts, in barrels, with wooden hoops, of 100 pounds; canned oysters, lobsters, and salmon, in 1-pound tin cans, from twenty-four to forty-eight, in strong, wooden cases with iron hoops; preserved meats, in 1, 2, 4, 6, or 14 pound tin cans with forty-eight, twenty-four, twelve, and six cans per box, which should be of strong wood with iron hoops; preserved fruits, in 2-pound cans, twenty-four per box, strong wood; lard, in wooden barrels, with wooden hoops, weighing from 350 to 400 pounds; bonegrate, packed like lard; tallow, in hogsheads weighing from 1,000 to 1,200 pounds; resin, in pine barrels, with small, iron hoops, weighing from 380 to 500 pounds; tobacco (Kentucky and Virginia), in barrels with wooden hoops, weighing from 1,400 to 1,600 pounds, 60 to 80 inches high, and about 40 inches in diameter; seed leaf, in heavy, wooden cases, 300 to 400 pounds, about 40 inches in height, about 60 inches in length, and about 40 inches in breadth.

Liquids.—Petroleum, in strong, wooden barrels holding about 40 gallons and weighing 350 to 400 pounds.

Iron manufactures.—Ironmongery, in wooden cases lined with strong paper (hay, straw, wood shavings, or paper is used for packing); firestone paper, in bales of 10 reams covered with strong, waterproof paper, with boards on both sides and the whole wrapped well with strong cord.

Hardware.—In wooden cases lined with strong paper. Single articles are packed in cardboard or wooden boxes.

FREDERICK OPP,
Consul.

BLESLAU, *September 9, 1893.*

BRUNSWICK.

Of the several sorts of goods mentioned in the circular only two—groceries and liquids—are imported in considerable quantities from the United States directly into the duchy of Brunswick.

The present mode of packing these goods is generally praised; indeed, nearly all the leading merchants, from whom I have received my information, were of the opinion that it could not be surpassed. They say it very rarely occurs that the goods suffer damage on the way, and that when damage does occur it is never due to defective packing, but either to the original state of the goods or to unforseen or uncommon occurrences. The only exception to this general rule is petroleum. Of petroleum, my informant says that very often the barrels are not quite full upon arrival here, and that, in his opinion, this is due to the fact that often old barrels are used which have not been properly repaired.

Goods are generally sent to the interior by railway. They are then put into warehouses, and thence conveyed by wagon to the consignee.

The following are the goods principally imported from the United States into the duchy of Brunswick:

Coverings not dutiable: Lard, in tierces; meat, in cans; maize flour, in cases; caviare, in kegs; maize, in cases; dried apples, in cases; oysters, in cases.

Coverings dutiable: Petroleum, in barrels; mineral lubricating oil, in barrels; dyestuff extracts, in cans.

CYRUS W. FIELD,
Consul.

BRUNSWICK, *November 22, 1893.*

CHEMNITZ.

EN ROUTE FROM THE UNITED STATES.

The American goods that come to Chemnitz are cotton, wheat, oil, and canned meats. They come, of course, by ocean steamships to Hamburg, Bremen, Rotterdam, Antwerp, etc., and thence by rail, river, or canal to the inland cities. Of all the products received in this district, cotton is by all odds the most important, 702,342 bales of 475 pounds each coming from the United States, 134,627 bales of 700 pounds each from Egypt, and 378,275 bales of 400 pounds each from India.

WAREHOUSING.

The warehouses all over Germany are large and good. The wares, while in the hands of warehousemen, are very little exposed to either wind or weather.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior in covered freight cars, the cost depending upon whether they go "fast," "middling fast," or "slow." They are sometimes loaded into the cars on the dock and sometimes from drays. From Chemnitz to the neighboring villages and outlying factories they are transported on large wagons or drays. The wagons vary in size. As much of the shifting and moving is done by hand, the weight and bulk of the goods should not be great.

OUTSIDE PACKAGES.

The principal thing is to use such covering as will keep clean and dry, and such packing as will be firm and convenient. To nothing else does the

German pay so much attention as to the packing of his goods. He acts upon the principle that a poor article in an attractive box is much more easy to sell than a good article in a poor or indifferent box. What at first would seem waste is soon seen to be excellent business foresight; hence the very best place for our merchants to get a good object lesson in packing is on the docks, wharves, and warehouses of New York, Boston, and our other large cities. A few weeks ago I read of a plan, projected by German merchants, to experiment with this very matter by packing goods of all kinds in different ways recognized as good and to send them abroad on a sort of trip around the world to test their merits. Going on the same ships, being handled in exactly the same way, such a test could not fail to be of great value, and the costs, distributed over the Empire, would be trifling to each chamber of commerce or manufacturer contributing thereto.

I have heard no complaints about our grain; I have heard some about oil cans bursting and barrels leaking.

As to canned goods, complaint is made that the boxes in which the cans are packed are too frail; that they might be stronger and better, and that they should be lined with tin. The dealers here tell me our meats are well liked, and that complaints are not numerous. When complaints are heard it is because of carelessness in packing. Concerning these goods, I may add that, when one thinks of the prices of meats here—from 15 to 60 cents per pound—there should be a large market for American canned meats. The firm taking greatest care and having the least number of complaints against its goods must have a profitable future before it. I know of nothing that offers greater prospects to care and enterprise. The Germans are great picnickers; they go into the woods and fields Sundays and holidays in crowds, taking along huge hampers or hand baskets filled with food. What could be better suited to just such a purpose than American canned meats of all kinds?

Goods sent hence to India, Australia, and South America are packed, for the most part, in wooden boxes lined with tin, to make them water-tight. A characteristic of the German agent abroad is to find out just how his customers want their wares packed and to urge that, if possible, they be so packed. There is, they think, no more important factor in trade.

COTTON BALING.

Through the kindness and courtesy of the largest spinning concern in Chemnitz I can give the Department definite and very desirable information, backed up by photographs.

The packing of American raw cotton causes a deal of anxiety and complaint here. The jute-cloth covering is so torn before the bales reach Chemnitz that the cotton is exposed to mud, water, fire, and theft. Of the original six or eight iron bands, two, three, four, and sometimes more are loose or broken; the cotton bulges out, takes up dirt and dust when in a dry place, mud in the docks, sea water when in the ships, and rain water when on land, on wharves, or in transmission by boat, rail, or wagon. In transport every gust of wind tears away pieces of the valuable commodity. The wharves, custom-house floors, and freight cars are usually covered with pieces torn or dropped from such bales; and the danger from fire is great, for cotton ignites easily, and sparks from cigars or locomotives, fanned by winds, even those caused by the movement of a train or wagon, could cause not only the burning of the cotton, but of other valuable property.

Contrasted with the packing of Egyptian and Indian cotton, the American must be regarded as very bad. Both Egyptian and Indian have close, compact, tough coverings, are rather long and smooth, leave little or none of the cotton exposed, are easily and plainly marked, and are wrapped close and bound strong and tight. Along the sides the firm's or seller's name appears. On both ends the kind of cotton is indicated to aid in identification should one end be torn off in handling, as sometimes happens. Thus, in the case of Indian and Egyptian cotton, mixing of bales and bales without marks seldom if ever occur; on the other hand, with American cotton both happen very frequently—too frequently, hence the complaint.

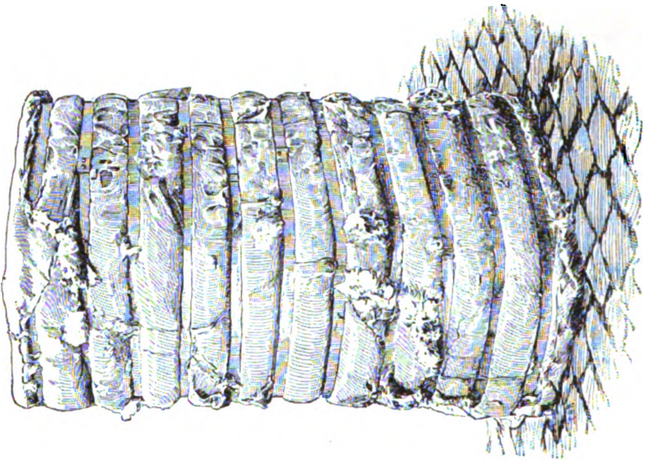
The Indian and Egyptian bales are so tightly pressed, so well covered and bound, that injury from fire, water, dirt, dust, etc., is minimized. Take this table as to space occupied by the different bales:

Bales of cotton.	Weight.	Space occupied.
	Pounds.	*Cubic feet.*
Egyptian	700	15
Indian	400	10
American	475	22

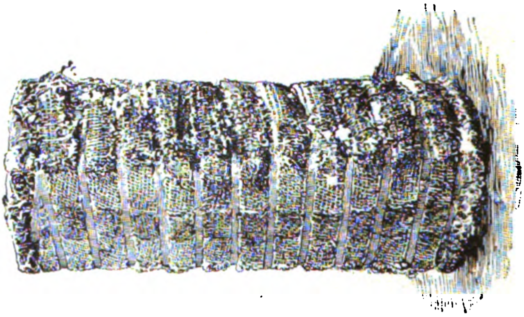
The Lloyds, who can pack into their vessels' holds 16,000 to 18,000 bales of Indian cotton, can take only 6,000 to 10,000 American, when, according to the ratio of weights (4 to 4¾), they should take in 14,000 bales. Consider this in the figuring of expenses, where $3, $4, $5, etc., are paid per cubic yard for ocean freights. What appears here in the matter of ships holds equally good in relation to transport wagons, room taken up in freight houses, magazines, and storehouses, etc., all of which add to the expenses. I am informed that producers, as well as manufacturers, have to pay "enormous sums" for these "unnecessary" expenses. Besides, the American planters waste large quantities of unnecessary packing material. The losses by dirt, dust, mud, bursting of the bales, by stealing, etc., affect the producer and manufacturer in about the same ratio.

The increased danger of fire increases the premiums on fire-insurance policies. The mixing of the bales and the "no-mark bales" cause no end of confusion. More secure packing, a much closer pressing, and greater care in covering or wrapping up, would be of inestimable and permanent benefit to the cotton trade of the United States.

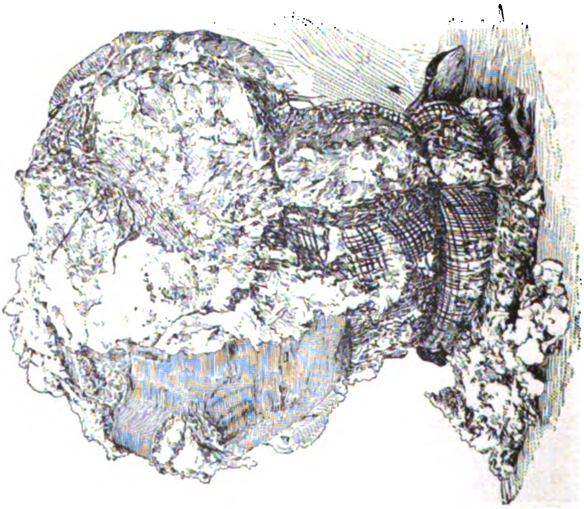
Planters formerly entertained a fear that the enormous pressure used in India would injure the fine fibers of the American cotton, would make more



EGYPTIAN BALE, 700 POUNDS.



INDIAN BALE, 400 POUNDS.



AMERICAN BALE, 500 POUNDS.

difficult the processes of cleaning, and would cause the formation of small knots which would injure the carding machinery, but such belief has disappeared. The fact that Egyptian cotton, with as fine or finer and longer fiber, has stood greater pressure satisfies everybody interested that the time has come for a reform in American methods of packing. Of course, great care is to be taken before packing to see that the cotton is perfectly dry; otherwise internal fermentation will create "cakes," resulting in the same danger to the carding machinery as that caused by the little knots described above. Egypt and India have small fear of these dangers, because of their particularly dry climate, especially during the packing and shipping season.

The photographs of these bales of cotton as they reached the spinning mill at Chemnitz tell their own story more graphically than words can tell it.

J. C. MONAGHAN,
Consul.

CHEMNITZ, *October 14, 1893.*

COLOGNE.

EN ROUTE FROM THE UNITED STATES.

Only a small part of the American goods sold in this market is shipped direct to this place. The greater bulk is purchased from the stocks held by the large commission houses at the various seaport towns. Consequently the goods do not reach here in their original packages, being repacked by the seaport commission houses for shipment to the interior.

The articles received direct from the United States consist chiefly of carpet-sweepers, grass-mowers, machines for making ice, spokes, hubs, tool handles of hard wood, locks, wrenches, tools, planing machines, clothes racks, meat-choppers, hair-clippers, bacon, hams, etc. The articles are shipped chiefly from New York and Baltimore to Antwerp, Amsterdam, and Rotterdam, and thence by the River Rhine in towed barges.

LANDING AND WAREHOUSING.

Here at Cologne the goods are landed direct on the spacious wharves that have recently been improved and enlarged at an enormous cost. The present means of protecting the goods on the wharves from the elements are apparently very poor. The goods are for the most part left exposed or are covered with oilcloth to protect them whenever it rains.

OUTSIDE PACKAGES.

The best material for outside coverings of these articles is boxes made of light, strong wood, so that they may be handled more conveniently and the freight reduced as much as possible. Importers complain that these boxes are sometimes made too bulky.

As the materials used in the United States for packing purposes are usually of a superior quality, the demands here with respect to the packing are completely met. It is on this account that when the packing is reckoned it is comparatively expensive to the importers. Many shippers, however, make no charge whatever for packing. The materials used here for packing in general are said not to be as good, and as much as possible is spared in this respect.

DUTIES ON PACKAGES.

The German tariff of duties on foreign importations is specific, the rates being for each 100 kilograms (220 pounds). As the duties are levied on the gross weight only by the lower rates of the tariff, the charges for boxes, kegs, etc., do not affect to any important extent the cost of the goods. All articles on which the duty does not exceed 6 marks ($1.43) per 100 kilograms are assessed on the gross weight; all tariff rates exceeding that amount are levied on the net weight alone.

WM. D. WAMER,
Consul.

COLOGNE, *October 21, 1893.*

FRANKFORT.

EN ROUTE FROM THE UNITED STATES.

Most goods which are imported from the United States to the consular district of Frankfort are landed at Rotterdam and brought by iron barges up the Rhine and Main rivers to this port. This may be said to apply to all coarse and heavy merchandise. Small shipments of more valuable goods, especially when required in winter, are sometimes imported via Antwerp, Bremen, or Hamburg and come to Frankfort by rail; but the railway freight rates are so high that whenever possible the river route is utilized for both imports and exports, by which only one transshipment—that at Rotterdam—is involved.

LANDING AND WAREHOUSING.

Goods are landed at Frankfort directly on wharves. A few years ago the River Main, from Frankfort to its confluence with the Rhine at Mayence, was deepened and provided with locks and dams so as to permit Rhine barges and small steamers to come directly to Frankfort. At that time there was built here, as part of the general improvement, a substantial haven or port, with capacity for sixty or seventy vessels, which are thus thoroughly protected from storm or current in all weather and stages of water. Around this port are broad, solid stone wharves, flanked on the land side with new and commodious brick warehouses equipped with hydraulic cranes, winches, and elevating machinery of the latest and most improved patterns. There is, besides, a Government custom-house, with stone wharves and landing machinery further up the river opposite the central portion of the city, so that all freight arriving at Frankfort by water is landed under the most favorable conditions.

Warehouses are also provided for all goods arriving by rail, so that in either case there is no liability of merchandise arriving at Frankfort being injured by exposure to the elements.

EN ROUTE TO THE INTERIOR.

With the exception of the few goods which are reshipped from Frankfort up the river to Hanau, Aschaffenburg, and a few smaller places, all merchandise is distributed from this point by rail. Freight is, as a rule, handled much more carefully in this country than in the United States. Packages that have stood rail transport in America and reshipped at an American port and the sea voyage may be confidently expected to withstand any handling or usage that they will encounter in Germany.

OUTSIDE PACKAGES.

The best material for outside coverings depends upon the nature of the merchandise contained. If the goods are of such a nature as to be liable to injury by dampness, the coverings should be waterproof. This is true of all textile fabrics and machinery with polished journals or other parts that are liable to be injured by rust. Every experienced merchant knows how penetrating and corroding the hot, damp, saline air of a ship's hold is liable to become, when, as is often the case, all kinds of freight are piled together and subject to the movement of the vessel in rough weather. In former years there was much complaint from German importers of the frailty of white-pine coverings in which American machinery and other heavy freight was packed, and which often arrived in a seriously damaged condition. Of late years this class of packing has distinctly improved, and, moreover, much of the import trade from the United States is now in the hands of large firms at Hamburg and Bremen, who, as special agents of the importers, receive, set up, and put the goods in order and distribute them to retailers and other purchasers in the interior. In this way defects in packing are first noticed by the agents of the exporters, and, being promptly reported and the damages charged to the American shippers, the fault is soon corrected.

A somewhat thorough consultation with the firms in Frankfort most directly interested in this subject has led to the conclusion that there is now comparatively little complaint in respect to American packing with the exceptions to be mentioned: American cotton is, as hitherto, the worst packed of all that comes to this part of Germany. The bales are large and heavy, and are generally bound with so few hoops that there is a space of from 7 to 10 inches between the ties exposed to the hooks of stevedores and to other perils. It is generally easy to pick out the American bales from any pile of cotton by their torn and bedraggled appearance. Leather is often also badly packed, the coverings being thin and easily pierced by hooks, so that in some cases the skins nearest the surface of the bale are seriously injured.

Seeds and dried fruits are generally received from the United States packed in barrels which have originally contained sugar. These form excellent coverings, and dealers in this class of imports have no complaints or suggestions to offer. As a rule, barrels are considered better outside coverings than boxes or bales. Besides being usually tighter and stronger, they can be rolled easily and without shock and lifted from the hold of a vessel by a blunt double hook clasping the chimes.

"Wood wool," made by machinery which shreds pine or other soft wood into a soft, spongy fiber, is now cheaper in Germany than hay or straw, and is strongly recommended for inside packing. It is cleaner than straw, is also softer, and has the important advantage that it does not ferment or gather dampness, and may be used over and over again for packing goods which would suffer from shock or abrasion.

The most serious complaint that has been encountered in collecting materials for this report comes from a leading dealer in stoves and hardware, who keeps in stock an assortment of American base-burning stoves and sells forks, rakes, shovels, and extra handles for such implements of American origin. Some of his stoves are imported from Detroit and are packed in the usual open, wooden crates. His testimony is that in three-fourths of these crates some part of the stove has been broken or lost in transit. In some cases the stove is cracked from bottom to top and requires complete overhauling and the replacement of two or three of its principal castings. As it requires from two to three months to order and obtain from the foundry special pieces, he is obliged to keep in stock a full line of separate parts, which renders competition with German imitations of American stoves, which is already difficult, nearly impossible. Only the palpable and acknowledged superiority of American-made stoves over any foreign imitation enables them to hold a place in the German market. This difficulty is attributed less to defective packing, which is in the main strong and well secured, than to inexcusably rough and careless handling during the transit by rail in the United States or when being put on board ship. In many cases the crates bear evidence of having been dropped on an edge or corner with such violence as to crush the wood and break the contents. Tobacco hogsheads are also complained of to some extent as being made of weak, sleazy staves, rudely joined, and abounding with knot holes. Being heavy, they are often roughly handled and the casks so broken as to expose the contents to dampness and dirt.

Bundles of ash-wood handles for shovels, forks, etc., from the United States are generally merely tied together with cords in such manner that they work loose and are thus liable to be lost or stolen. It is suggested by a leading importer of these goods that packages of this kind should be secured by a board on each side clasped together by iron bolts passed through and fastened by nuts that can be tightened so as to hold the contents firmly together. Polished handles should also be wrapped in waterproof cloth or paper, as dampness destroys the polish and renders such goods more or less unsalable. Smaller articles of hardware should be packed with wood wool in strong, wooden cases, the corners of which should be secured by metal fastenings. In no case should such a box and its contents be of greater weight than from 200 to 300 pounds.

DUTIES ON PACKAGES.

All cases and coverings which are in contact with the goods and are sold with them are dutiable when imported into Germany, and the general rule is to assess the duty on that portion of the covering which, from its material or nature, is subject to the highest rate. The duty on cans, bottles, jars, etc., containing preserved meats, fish, fruits, and vegetables amounts to about one-third of the entire import duty on such merchandise, and this is really the chief obstacle to a great increase in this class of imports from our country to Germany. American canned fruits and meats are well known here and are acknowledged to be superior to all others in the market, but the duty on such articles as sweet corn, lobsters, and cove oysters is $14.28 per 100 kilograms (220 pounds); and that on tongue, corned beef, and meat extracts $4.25 for the same quantity, which, with the trouble and cost of transportation, puts such food products beyond the reach of all but the well-to-do classes. Notwithstanding this, however, the use of American canned goods is steadily though slowly increasing in this country, the trade being fostered by large wholesale firms in Bremen and Hamburg, who represent directly the American packers and who, from their experience and knowledge of German laws, are enabled to supply them to retailers in other cities at minimum cost.

The duty on coverings of all kinds depends upon the material of which they are made. Tin, zinc, and glass are subject to the highest duties; wood and textile wrappings, such as jute and gunny cloth, are the cheapest in this respect. The high duty that was formerly assessed on petroleum barrels is now successfully evaded by importing both crude and refined petroleum in tank steamers, from which it is pumped and distributed to a great extent by tank cars.

GERMAN COMPLAINTS.

It remains to be said, finally, and as perhaps pertinent to the general scope of this report, that the two most serious complaints of German importers against American exporters are the old, threadbare assertions which may be condensed under two heads, as follows: First, the apparent indifference of American merchants to orders from abroad, their neglect and delay in answering inquiries or filling foreign orders, and, second, the blunt and peremptory manner in which they turn over goods ordered from abroad to a shipping agent at the nearest seaport and insist upon payment the moment the merchandise is delivered on board cars or at tide water, in accordance with American usage in the home trade. This obliges the European purchaser who orders American goods from the manufacturer to pay for them before they arrive—to buy a thing which he has not seen. This is a rank departure from European methods. And the objection to it is not fully answered when it is urged that American importers pay readily for European goods when delivered at the railway station nearest the place of manufacture. "That is your American way of doing business," say the complainants, "but it is not our way, and in times like these, when competition is so fierce in all lines of trade, the purchaser, as well as the seller, should have something to say about terms and conditions of payment."

FRANK H. MASON,
Consul-General.

FRANKFORT, *September 30, 1893.*

HAMBURG.

EN ROUTE FROM THE UNITED STATES.

Goods arrive here from the United States by direct steamers and sailing vessels or indirectly via Liverpool, London, Hull, Antwerp, Rotterdam, etc.

LANDING AND WAREHOUSING.

Steamers, unless drawing too much water and thus compelled to lighten below, generally discharge at wharves, while sailing vessels as a rule discharge into lighters.

The wharves are covered by sheds, open in front, but fairly protecting goods against the inclemency of the weather.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by rail and water. The railway tracks are directly behind the wharf sheds. Bulky goods bound up the River Elbe are either discharged directly into covered barges or from the wharf into lighters. Though not specially restricted as to size or weight, is is advisable to be conservative, if possible. Large-sized or heavy packages require extra labor and care and increase the cost of transportation.

OUTSIDE PACKAGES.

The outside covering should be made of such material as best suits the nature of the goods. At all events, the material should be substantial, as damages on account of insufficient packing are difficult to recover.

The barge and lighter service is very well organized here, and little danger from rain is to be feared, owing to the extensive and obligatory use of tarpaulins; but a substantial outside covering is a good guaranty against pilfering.

DUTIES ON PACKAGES.

Generally, customs duties are collected on the net weight of goods; on certain staple articles, such as grain in bags, machinery in crates, etc., the duty is gross for net.

CONCLUSION.

In conclusion, I would beg to state that I assume that the Department's circular calling for this report was intended principally for places where the facilities for handling arriving merchandise are not so perfect as they are in Hamburg, and I have therefore not deemed it necessary to go into greater detail.

W. HENRY ROBERTSON,
Consul.

HAMBURG, *October 12, 1893.*

KEHL.

American cotton is extensively used by the manufacturers of Alsace. It is received at Bremen and thence shipped by rail to the factories. It is weighed at Bremen, where damages, if there should be any, are appraised. It is received here very often in bad condition.

The groceries coming from the United States reach this place via Antwerp or Rotterdam. From Antwerp they come by rail and from Rotterdam by freight boats. In Rotterdam the goods are transshipped to freight boats for Mannheim via the Rhine, and from Mannheim they are brought hither by rail. Under favorable water conditions goods are shipped from Rotterdam direct to this district (Strassburg).

In Strassburg fine warehouses are provided for the storage of goods.

Trade with the interior is insignificant, and is principally by rail, although under favorable water conditions it can be effected by freight boats on the Rhine and the Rhine-Rhône canal.

Neither liquids, iron manufactures, nor hardware are imported at Kehl from the United States.

No customs duties are charged on outside coverings, such as kegs, barrels, boxes, etc.

JOHN H. DRAKE,
Consul.

KEHL, *November 22, 1893.*

MAGDEBURG.

AMERICAN FATS AND PORK INSPECTION.

In order to be able to make a most comprehensive report on the subject mentioned in your circular of July 7, I put myself in communication with the board of commerce in this city. This body hesitated at first to treat this matter officially; but afterwards, thinking that both countries might be benefited, took action and sent a circular letter to every firm dealing in American goods. The answers received were most gratifying, as, with a single exception, every firm testified to the superior mode of packing American goods, and no changes were suggested. One firm, however, dealing in fats and oils, complained of the contents of some of the packages, which frequently were not according to contract, and even the official certificate of inspection was not a sufficient guaranty. This latter statement was also made to me a few weeks ago when I inspected the Magdeburg stock yard and slaughter-house, where the supervising medical officer told me that, as far as pork products were concerned, he thought the American certificate of inspection of little value, and he himself would under no circumstances accept it. Whether this is founded on facts or not, I am not able to say.

I tried to find out the name of the firm who made the above assertion, but the secretary of the board would not disclose it without the firm's permission, and this could not be obtained.

I interviewed a number of firms personally, and elicited from them the same pleasant facts which were brought out by the board's circular letter.

EN ROUTE FROM THE UNITED STATES.

Dry goods, iron manufactures, or hardware are not received in this district from the United States. The only merchandise imported here, as far as I could ascertain, is cotton, wheat, rye, corn, tobacco, rice, petroleum, turpentine, cotton-seed meal, dyewood extracts, canned goods, lard, dried fruits, lumber, resin, and dyewood.

American goods, with few exceptions, reach this district by water. They are loaded from the transatlantic steamer at Hamburg on barges which lie right alongside the steamer and are tugged up the River Elbe by powerful boats. Of course, when navigation closes in winter, railroads are used; but merchants generally lay in their supplies before and seldom have to use railroads.

LANDING AND WAREHOUSING.

On arrival of the barges, the goods are landed directly at wharves, which are generally covered by sheds.

Warehouses are close by, and the only exposure to the elements occurs when the goods are in transit from the wharves to the store.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by water (Elbe) if their destination can be thus reached; if not, freight trains are used. This year, owing to the low water in the river, water freights were considerably higher than usual, and for that reason railroads were more freely employed. Ordinarily water freights are from 50 to 66 per cent cheaper than railroad freights.

OUTSIDE PACKAGES.

The best material for outside covering varies with the different classes of goods. It is, however, so well established and so suitable in all the above-named articles that it needs no description. Whatever it be, it ought to be as light as possible, as the freight, as well as the duty, is calculated in Germany on the weight; and the direct inclosure of the goods is, with few exceptions, added to the dutiable weight. To illustrate, on wine in casks the casks are included in the weight and on wine in bottles the bottles are included, but not the wooden box containing the bottles. A schedule rate is established by the Government, making a fixed percentage allowance for every kind of package, and a separate weighing of the latter is not required. I do not see any necessity for waterproof packing, as it would only increase the cost of the merchandise. Goods are well taken care of on the entire way over and will not suffer by water, unless the vessel itself is damaged.

One suggestion was made to me as to the mode of packing cotton-seed meal. It arrives here in bags, 220 of which make 10,000 kilograms,* one bag containing, therefore, 45.45 kilograms. This is not a convenient weight for the trade here, and if it could be packed in bags of 100 kilograms it would be preferable. All feed articles are retailed here by the 100 kilograms, and a bag of that weight suits best the convenience of trade. If a bag of 100 kilograms, owing to its size, is not convenient for shipping, one of 50 kilograms would be preferred to the present weight.

Resin is the only article arriving here which is packed in cheap and poor barrels, but I understand that, being extremely cheap, it will not pay to use a more expensive package.

DUTIES ON PACKAGES.

The following articles, as far as duty on packages is concerned, are affected as follows: Wheat, rye, corn, lumber, and dyewood arrive in bulk; tobacco, allowance made for inclosure; rice (arriving in jute bags), weight of the bags to be included; petroleum, barrels to be included; turpentine, duty free; cotton-seed meal, duty free; dyewood extracts, vessels included, but allowance made for the inclosure of the vessel; canned goods, cans to be included, but allowance made for the wooden packing box; lard, allowance made for the barrels or tierces (this is one of the exceptions); dried fruits, inclosure dutiable; cotton, duty free; resin, duty free.

JULIUS MUTH,
Consul.

MAGDEBURG, *November 16, 1893.*

MAYENCE.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach this district chiefly by way of the Rhine from Antwerp or Rotterdam. Such as are not imported by this route come by way of Hamburg and Bremen; but the merchandise that comes in this way seems to be trifling in amount. At Antwerp and Rotterdam goods are generally transferred from the ocean steamships to river steamers and iron barges and brought up the Rhine in this way. Sometimes they are carried by rail. Goods from Hamburg and Bremen come by rail.

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*1 kilogram = 2.205 pounds.

LANDING AND WAREHOUSING.

This is a river port far inland, and goods when they come up the Rhine by water are landed at wharves or on a stone quay. Boxed and baled goods come generally by steamers, and loose goods by iron barges.

Mayence is a customs port, and the warehouse accommodations are new and excellent for a place of its size, and more than answer present requirements.

EN ROUTE TO THE INTERIOR.

Shipments are often broken up here by forwarding agents and shipped by rail to their destinations. A large quantity of goods passes through the port of Mayence by river or rail in transit. A good deal of grain, petroleum, and coal passes through here, but Mannheim is a much more important place for these things. The number of importing firms here is small.

OUTSIDE PACKAGES.

Little objection is made to the manner in which American goods are packed and shipped. American packing is, as a rule, regarded here as very substantial, but considerable objection, I learn, is made to the free use at American ports by the stevedores and dock hands of large, sharp hooks in the handling of freight, by which they catch it up with greater ease and dexterity. Baled goods are often very much damaged in this way, and so much complaint has been made on the subject that the forwarding agents at the receiving seaports, so I am informed, are now rejecting all goods that bear marks of damage from hooks. Bales are torn by them and boxes sometimes split open. In the case of leather, whole skins are sometimes ruined by them. The use of these hooks is not confined to American ports, however, as they are also in vogue at the European ports. They are a great aid in the handling of freight, but when used with recklessness do a great deal of damage.

With reference to turpentine, complaint is made that while first-class barrels—that is, regular turpentine-oil barrels—are generally used in shipping, very inferior ones are at times employed, made of mean, porous wood or of a second-hand nature, as old whisky or old oil barrels. From such barrels the contents leak more or less during a voyage. Only sound barrels should be used.

A forwarding agent here, through whose hands a good deal of tobacco passes to Bavaria and elsewhere, complains that the hogsheads in which tobacco is shipped are not strong enough, and get badly damaged en route to destination. He led me to infer that they have generally to be patched up here or at the seaports.

A great deal of resin is imported here. This is a cheap article, and the barrels in which it is shipped are consequently poor. They go all to pieces at times before they reach their destination. Resin is brought from American ports chiefly as ballast, so I am given to understand. It is said that iron hoops for resin barrels are now beginning to be used at the southern ports, which is a decided improvement, adding greatly to their strength. A firm here importing large quantities of resin suggests that the barrels be not only marked as they are at present, but also numbered, as the numbers on the barrels would be of great service in handling and checking them when 4,000 or 5,000 arrive at a time, as they do.

There is one importer here of American lumber—pine and oak—though not a large one. He says American dealers in lumber sell free on board at American places of shipment, but that it would be much more advantageous to them, in his opinion, if they would sell deliverable at Rhenish ports, as their lumber would then find a readier market on the Rhine. Lumber is shipped from the United States mostly by steamers, I am told, though sometimes by sailing vessels, to German, Belgian, and Dutch ports, whence it goes by rail or water to interior places. A good deal of cedar wood passes through here en route to the pencil factories of Bavaria.

DUTIES ON PACKAGES.

All customs duties in Germany are specific, and the immediate coverings are reckoned with the goods. This system of collecting duties makes it difficult for any but an expert to reckon what percentages the duties on goods bear to their values. In fine groceries the duties on cans, bottles, and casks amount at times, I am assured, to at least one-third of the whole duty on the goods concerned; and the duties on these goods often run from 50 to 100 per cent of their value. The duty on a 2-pound can of fish, vegetables, or fruit, for instance, amounts to 12 cents, which is a heavy imposition. The duty on a bottle of whisky is 52 cents; on a bottle of wine about 12 cents.

I know of a case where an American dogcart costing $30 in the United States had to pay $35 duty here, or over 100 per cent on its value, because the tariff, being specific, imposed 150 marks ($35) on all carriages, irrespective of worth, having any leather or upholstery work about them. The most valuable coach or carriage would not have paid more. Had it not been for a little leather on the seat, this dogcart would have paid only a trifling duty of about $2.50.

In exporting to Germany the containing vessels should be as light as possible consistent with safety of goods, but no merchant with whom I have conversed or communicated has been able to suggest any improvement in the method of packing for export now in vogue. Liquors should be shipped in barrels.

Cases and barrels serving as exterior coverings are free of duty, that is, have certain tares allowed. The duty on sugar corn, oysters, lobsters, and salmon is 60 marks ($14.25) per 100 kilograms (220 pounds), with 20 per cent tare when in barrels and boxes, 13 per cent when in baskets, and 6 per cent when in bales. On hominy, maizena, and white wheat the duty is 10.60 marks ($2.50) per 100 kilograms, with 13 per cent tare when in barrels, boxes, or baskets and 6 per cent when in bales. On dried apples in slices the duty is 4 marks (95 cents) per 100 kilograms, with no tare. The duty on whisky is 180 marks ($42.84) per 100 kilograms, barrels included; when in bottles in cases an allowance of 24 per cent is made for tare, and when in baskets 16 per cent. Corned beef, canned tongue, and meat extracts pay 20 marks ($4.75) per 100 kilograms, with 16 per cent tare on the cases and 24 per cent tare on the meat extracts. Canned fruits and vegetables pay 60 marks ($14.25) duty per 100 kilograms, with the same rates of tare as for the sugar corn, lobsters, etc., mentioned above.

It is always cheaper to import liquors into Germany in barrels. The duties on the cans or bottles containing fruits, fish, vegetables, liquors, etc., amount, I am told, to at least one-third of the whole duty on these articles and are a heavy burden. The great drawback to the ready sale of American canned and bottled goods in Germany is the heavy duties imposed on them. Grocers find it more advantageous to draw their supplies from Hamburg importers or other wholesale dealers than to import direct. There is no great difference, I am informed, between the prices of the New York exporters and those of the German importers, and the latter, from their intimate knowledge of the wants of their customers, are better able to serve them.

Turpentine is duty free, but on petroleum a duty of 6 marks ($1.42) per 100 kilograms is levied. Petroleum is now brought to Germany in tanks and barreled in the country; but formerly, when imported in barrels, the customs authorities insisted on reckoning the barrels as fine cooper's wares, which added considerably to the duty and was the subject of much complaint.

Resin pays no duty.

JAMES H. SMITH,
Commercial Agent.

MAYENCE, *September 20, 1893.*

MUNICH.

Very few articles are imported here direct from the United States. Petroleum is transferred from the vessels at Hamburg or Bremen into iron cistern cars and brought in this way to Munich. A few small machines, such as typewriters, are also imported direct. They are packed in strong, wooden boxes. The importer of them—the only person in Munich interested in the importation of American articles—informs me that the American packing with which he is familiar is most excellent, and could not, in his opinion, be improved upon. He referred particularly to the excellent material out of which the boxes are made, the good workmanship displayed in putting them together, and the efficient manner in which the articles are braced and fastened into the boxes. American stoves are also widely advertised by firms here, but I doubt if there is a genuine American stove in Munich. They are all cheap imitations made in Germany. I was informed at the custom-house that there had been in the past occasional small shipments of raw tobacco, brandy, and silverware, but could not obtain further details. The material here is consequently very slight for such a report as the circular called for.

This consular district is in the extreme southern part of Germany, and American goods would naturally come here via Hamburg or Bremen. They would be transferred from the vessels to freight cars, and would be landed from these same cars at the Munich station. The time occupied by freight cars in making the journey from either of these ports is from twelve to fourteen days. The goods would be under shelter, would not be exposed to the elements, and would not be likely to be subjected to much hard usage.

It may be said generally that the conditions prevailing here are not such as to require different packing or different material for outside covering from that employed for shipments to other cities in Germany. Goods packed in such a way as to be able to endure the sea voyage safely would be in a condition to bear the rest of the journey without difficulty.

The rule here is not to charge duty on box or keg or other outside covering, except in the case of liquids, when the vessel containing the liquid is included in the weight (the amount of duty being dependent upon the weight), but not the covering or box in which the vessel may have been packed.

F. W. CATLIN,
Consul.

MUNICH, *September 18, 1893.*

PLAUEN.

Most of the goods received from the United States at Plauen and in the Plauen district are ordered and delivered from the American agents who are located in the various large towns, such as Leipsic, Hamburg, and others. I find that the principal articles imported are cotton, petroleum, and canned goods (meats, fruits, etc.).

Complaint is made regarding the coverings of the bales and the packing of cotton, the coverings being torn in many cases and large quantities of the cotton hanging out from the various slits in the covering. This is not the condition of the Indian cotton, which arrives in neat and compact bales.

In regard to the other articles imported, there is general satisfaction. The packing should, however, be made as light as possible, as duty is assessed on the weight of the article, a certain percentage being allowed for the cans and boxing.

Warehouses are provided for the goods. There are also bonded warehouses, where goods are allowed to remain a certain time.

THOMAS W. PETERS,
Commercial Agent.

PLAUEN, *October 17, 1893.*

STUTTGART.

I have investigated the matter of the Department circular in each separate class, viz, dry goods, groceries, liquids, iron manufactures, and hardware, and I find that, except the first question submitted, none of the interrogatories can be answered by the dealers here.

All goods reach this district from the United States through wholesale dealers in Hamburg and Berlin. There are no firms here importing directly from the United States. It has been suggested to me by some of the dealers of whom I made inquiries that, as all merchandise from the United States pays freight according to the cubic meter, it is highly advisable to make the packages as compact as possible and in every way economize in space. Especially is this desirable in agricultural implements, such as hay and manure forks, etc.

ALFRED C. JOHNSON,
Consul.

STUTTGART, *September 19, 1893.*

GIBRALTAR.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States intended for this market and neighborhood are brought to this port by steam and sailing vessels, either direct from New York or via Liverpool and London.

UNLOADING AND LANDING.

The goods are put into lighters, which are towed by steam launches to the wharf and other landing places, where the goods are landed generally by the aid of cranes, and then carted to private warehouses or Government stores, as the case may require.

WAREHOUSING.

The warehouses where the goods are stowed are chiefly owned by private individuals, who let the same. They are scattered about the town, and are permitted to receive all kinds of goods, with the exception of refined petroleum in tin cans, a small portion of which is allowed to be stowed in private yards situated at the north front outside the gates of this fortress, and under strict police regulations. The larger portion arriving here for sale, if not all exported to neighboring ports or inland towns through the Spanish lines, is placed in hulks, which are moored outside of the shipping of this port.

Hulk licenses vary from 175 pesetas ($33.77) yearly for a hulk of from 50 to 100 tons register to 910 pesetas ($175.63) for a hulk of any size. Hulks or other vessels of any description used for the stowage of wine or spirits pay, in addition to the above charges, at the rate of one peseta (19.3 cents) per ton per annum. Boats and pontoons are also required to be licensed.

A part of the principal wharf for landing goods is roofed and affords some protection to goods which are landed in wet or boisterous weather previous to their being carted to warehouses. They are required to be removed soon after landing, unless otherwise permitted by special authority from the port department for some particular cause or reason.

While the goods remain in lighters tarpaulins are generally used to prevent their being exposed to the elements.

EN ROUTE TO THE INTERIOR.

When goods are forwarded by land to the neighboring Spanish towns, they are conveyed partly in carts drawn by mules, though chiefly by pack mules and donkeys, through the Spanish lines, where they are subject to rigid examination by the Spanish custom-house officials, and duties levied upon them according to the ruling tariffs of Spain. Such goods as are intended to be sent inland by railroad from the Algeciras depot are conveyed thither from this port in small Spanish sailing craft.

A load for a donkey, consisting either of bags of flour, beans, maize, wheat, or petroleum, may weigh from 100 up to 270 pounds, and that for a mule 500 pounds. The extent of travel is about 8 miles a day, the roads being bad and for part of the way consisting of heavy sand.

OUTSIDE PACKAGES.

No provision is made for an outside covering to any keg, barrel, sack, or bag, but boxes and bales containing dry goods and other valuable articles are inclosed in tin or zinc cases or wrapped up in oilcloth or pieces of tarpaulin before being inclosed in wooden cases or made up in canvas bales fastened with iron bands.

The prompt sale of any articles of constant daily consumption in this market, consisting of many kinds of American produce, is less dependent upon size or shape of the packages or method of packing than in the attainment of cheapness in the cost of the goods and lengthened credits for the payment of the orders, which advantage the merchants here are more successful in obtaining through commission agents and manufacturers on the continent of Europe than by ordering direct from the United States on their own account, where the business is conducted on a "ready cash" basis.

DUTIES ON PACKAGES.

Gibraltar, being a free port, has no custom-house, making it immaterial to the importer in what kind of packages goods are landed here either for sale or for transit, since they are not liable to duty.

The only exception made is in wines and spirits, which can not be entered for consumption without paying duties. Every cask or package must be examined and gauged by a revenue officer before being admitted into the town or garrison. If landed for exportation, these liquids are exempt from duty, but are conveyed to Government stores set apart for that purpose at a small expense in store rent.

The entrance into the town or garrison of firearms and munitions of war is strictly prohibited at all times.

HORATIO J. SPRAGUE,
Consul.

GIBRALTAR, *August 12, 1893.*

GREECE.

ATHENS.

EN ROUTE FROM THE UNITED STATES.

American goods reach Greece by way of Belgium, Great Britain, France, Germany, and Italy, and are generally handled two or three times in those countries before they arrive at any Greek port. Very little merchandise comes to Greece direct from the United States, except petroleum, and that is imported by the Hellenic Government principally in British vessels for the monopoly. The want of a good steamship line direct from the United States is, in my opinion, a great hindrance to the development of American trade with the countries of the Mediterranean, the Bosphorus, and the Black Sea.

LANDING AND WAREHOUSING.

Goods are landed at Greek ports by lighters.

Warehouses are provided at the custom-houses for all goods, except iron in bars, pigs, plates, rails, girders, and heavy pieces of machinery, cast-iron pipes and castings, window glass in cases, and coal, ores, etc.

EN ROUTE TO THE INTERIOR.

Goods are shipped from the principal ports to the country by coasting steamers and sailing vessels to the ports nearest the inland towns. The removal inland is by rail, by carts, and in some instances, where the roads are not good, pack horses or mules are used. Very little is, however, now transported to inland towns by pack horse, but where this does take place the packages are suitably made up by the merchants in the principal ports or coast towns, as the original imported package has to be opened at the port of entry in most instances for customs examination and valuation. They are then repacked by the sellers in quantities and styles to suit purchasers in the interior and the modes of conveyance thither.

DUTIES ON PACKAGES.

No customs duty is charged on boxes, kegs, etc., when they are of the usual kind, but if a specially costly packing is used, with evident intent to defraud the customs, not only is duty charged, but a fine is also imposed. I would advise all exporting goods to Greece to pack as well and securely as they can, using good, strong material, and not to make their packages heavy.

OUTSIDE PACKAGES.

Dry goods.—These should be packed in hydraulic-pressed bales, covered with strong waterproof sheeting, and over that a good, stout cover of canvas, hooped with steel or iron. No bale should weigh more than 400 pounds. Very fine and costly goods should have double outside covers, and the weight of each bale should not exceed 224 pounds. Silks, etc., in addition to being baled, should be packed in strong, wooden cases, well hooped and fastened. The weight of each case should not exceed 224 pounds.

Groceries.—All groceries should be packed in strong packing cases, dovetailed and fastened at corners with sheet iron or hooped all round the ends with strong hoop-iron bands securely fastened. No case containing groceries should weigh over 224 pounds. Coffee beans and rice should be packed in double bags weighing 78 kilograms (172 pounds) net.

Liquids.—Liquids such as mineral oils should be packed in tin cans, and these again in wooden cases, or in iron or steel drums of strong make and able to stand a deal of knocking about; the contents of each drum should not exceed 50 gallons. The same packing will do for vegetable or fish oils. Other liquids, such as beer, wine, spirits, etc., should be in bottles or barrels; if in bottles, twenty-four quart bottles should be packed in each case and the case well secured with hoop iron. To guard against tampering, a piece of soft wire should encircle the case, the ends secured by sealing wax. It is useless to put "this side up" or "with care" on cases coming here, as the men handling the goods can not read, and would not pay any attention to such requests even if they could read. Paints in a soft or liquid state should be put up in iron or steel kegs of 56 or 112 pounds net.

Iron manufactures.—All iron manufactures of a costly nature, such as steam engines, wood-working machinery, cotton or wool spinning or weaving machinery, and, in fact, all fine machinery, should, previous to packing, have a coat of some good varnish or lacquer to preserve them from damp, and then be packed in strong, dovetailed, wooden cases, with dry sawdust, hay, or straw. When parts are liable to get broken from rough usage, the case should be divided internally or the pieces held firmly in place by nailing butts over them. The cases should be well nailed, clipped at corners with strong sheet iron, and hooped; and, when possible, the weight of the case should not exceed one ton. When light machinery of a costly nature is being exported to this country, the cases should never weigh over 560 pounds each. For files, rasps, or other fragile steel goods cases should not weigh over 100 to 112 pounds. Cutlery, clocks, and electroplated goods should have special care in packing, and no case should weigh over 112 pounds. Cases should be extra strong and thoroughly waterproof.

Hardware.—All hardware should be packed in strong cases or casks, well fastened, waterproof, and not weighing over 224 pounds each.

Leather.—Leather and leather and rubber goods should all be packed in waterproof cases, strongly made, well fastened with iron or steel hoops, and not weighing more than 560 pounds to the case.

It is best to pack all goods liable to breakage or damage by rough handling in good, strong cases, and the weight of each case should be limited to what a man can lift, as there are few mechanical appliances at these ports for handling goods, and those which do exist are not of the latest improved kinds.

GEORGE HORTON,
Consul.

ATHENS, *September 27, 1893.*

ITALY.

CATANIA.

EN ROUTE FROM THE UNITED STATES.

Goods sent to any part of eastern and southern Sicily must be entered at Catania. All classes of goods may be sent in large cases or bales if Catania is the headquarters for an agency, but if the goods are to be sent to the interior direct, it will be well to divide consignments into small packages. This should be done where there is no agency for the goods, for off the line of railroads, even on the best of highways, the only vehicle for transport is a small two-wheeled cart, without springs, and drawn by not overstrong animals. In the mountainous districts of the island the goods are carried on pack animals.

Merchants and shippers are unanimous in advising that goods of all classes be so packed as to avoid injury from the weather, as well as damage by handling in transit.

Goods from the United States, if brought to Catania by sea direct, save freight and extra handlings. Express packages, however, not weighing more than 10 pounds are sent from the north down south through continental Italy; but this method is expensive and not frequently employed. It is usually the case that goods sent from the United States which consist principally of petroleum, lard, and firearms are transshipped at Genoa, Naples, Marseilles, or some English port. I do not hear of any handling of goods or usage on these routes which tends to injure the consignments.

Goods may be sent to Catania by the Government parcel post from any part of the Italian Kingdom in packages weighing not more than 6½ pounds or of greater volume than 80 cubic inches. No dimension of such a package can be greater than 2 feet. Liquids can also be sent to Catania in this way. The average packing case used in sending anything by parcel post is a thin box or light basket, the latter being the most common.

LANDING AND WAREHOUSING.

Goods are carried by men from the vessels to a stone quay in the harbor, but for dispatch lighters are often used at the same time. With the exception of large cases or bales of great weight, everything is carried by hand. If a small consignment of goods comes to the port of Catania requiring only two or three hours to discharge cargo, the vessel is anchored in the harbor and the goods transferred to lighters.

There are no public warehouses, and, on this account, goods are liable to be exposed to the elements. There is not much to be feared from rain except in winter, as from April to October the sky is almost always perfectly clear.

EN ROUTE TO THE INTERIOR.

As intimated above, goods consigned direct to the interior of the island are carried by pack mules or donkeys or by means of carts. The transport will be quicker and the goods less liable to injury if a consignment is divided into packages of 80 pounds each and having no greater dimensions than 5 feet. Despite inconveniences, almost anything can be carried in this way to the most remote districts, and even steel bars from 20 to 30 feet in length are carried in this manner. But the progress is naturally very slow. Bulk is a more difficult obstacle to overcome than weight.

OUTSIDE PACKAGES.

If practicable, the best material for outside covering is sacking or wickerwork over a thick baling of excelsior or some similar material. The package should certainly be made waterproof. Shotguns, rifles, and machinery should be separated one article from another, and each package made as small as possible. When circumstances permit, goods should be packed in bags or sacks, as they are by far the easiest to handle. Bales or hogsheads are of greater expense in transportation than an aggregate of small parcels which together may weigh almost twice as much. The Sicilian has no such machinery for the handling or transportation of goods of very large bulk as has the American, and a shipment of such a character is naturally attended by great inconvenience and cost. If liquids are sent, they should first be carefully corked and sealed with a wax which will not melt except in a very high temperature. The cork, in this case, should be tied down and the bottles packed in straw rather than in sawdust, and the whole put up in strong cases. Lard is often sent in tightly made firkins, well hooped, and the tops fastened with iron bands. As the lard in the firkins is more or less liable to exposure, and as the time before its consumption is uncertain, it is best shipped in sealed cans of about 10 pounds each. Sicilian grocers prefer this method, as refrigeration is expensive and little used. Furthermore, by this means the lard can be more easily sent into the interior.

About two shiploads of good grade petroleum are entered at this port per annum from the United States for consumption in Catania and the adjacent provinces. This oil is packed in square, tin cans each holding about 3 gallons. In shipping, two of these cans are put up in a single box, which is made of wood, and there is no dividing partition. However large the shipment, the packages are thus made small and convenient, with freight at the minimum. All consignments of petroleum from the United States to Catania are sent in this way. The oil can then be easily carried by hand, and its transfer by cart or pack animals is much facilitated. The dimensions of these packages are 2 feet by 10 inches by 1 foot 6 inches.

DUTIES ON PACKAGES.

No customs duties are imposed on the packing materials if such materials are of insignificant value and it is clearly seen that they are to be used for the purpose of packing only.

CARL BAILEY HURST,
Consul.

CATANIA, *November 11, 1893.*

FLORENCE.

EN ROUTE FROM THE UNITED STATES.

American goods reach this district directly from the seaports of Genoa, Leghorn, and Naples and indirectly from Havre, London, Antwerp, Bremen, and Hamburg. All goods, if not cleared at the port of landing, are bonded at the local custom-house, and therefore reach Florence or Bologna in bonded cars, accompanied by numerous vouchers or bills, which oftentimes are produced by brokers to the consignee and sometimes by the railway agents. Upon payment of freight and charges, a special notice is issued by the railway company for identification at the custom-house, where goods are to be called for within ten days from the date of their arrival. If not claimed within that period, they are wrapped in canvas, corded, and sealed, and subject to a storage fee of 2 cents per parcel per diem.

Unless specific instructions are given as to forwarding, packed goods are usually transported by the most expensive routes, and the consignee, if not in possession of a bill of lading bearing his own name, can not trace or check his goods, and is really not at liberty to give directions as to their movements, either one way or another. All is in the hands of shipping agents or brokers, who, for instance, transfer consignments arriving via Havre to a shipping firm in Paris, from thence to another in Modena, the frontier, or in Turin, and, finally, to other agents in Bologna or Florence, each one adding his bill of charges, thereby increasing the cost of carriage more from Havre, Antwerp, or London to Florence, than from New York to London, Antwerp, or Havre. The system is even more expensive and exacting when goods arrive at Florence through German seaports. Otherwise handling is satisfactory.

WAREHOUSING.

Warehouses are provided, but heavy and bulky goods when shipped through slow conveyance by rail are liable to exposure to the elements.

EN ROUTE TO THE INTERIOR.

There are no pack horses or porters used in transporting goods to the interior, but vehicles of every description take shipments in all directions. In the country districts rough cars or vans drawn by oxen are much used. The handling is generally good.

OUTSIDE PACKAGES.

The best material for outside covering is tarpaulin. Whenever practicable, the baling of boxes is considered a great protection, owing to the use of a stratum of hay or straw between the box and the canvas. Kegs and barrels are enveloped in an outer keg or casing.

Dry goods.—These are invariably placed in wooden boxes or cases, the boards of which are previously glued together, the sides and covers strengthened by narrow strips of wood secured by wire nails, and the covers set by screws. The outer wrapper is of light oilcloth, well strapped with strong cord and at times with thin iron bands.

Groceries.—This class of goods has the same kind of packing as dry goods, but the cases have internal subdivisions.

Liquids.—In kegs or barrels liquids usually have a second or additional keg or barrel casing. A special feature in Tuscany for the exportation of native wines and oils is to place 1 or 2 dozen flasks (oil in pint flasks and wine in 1 and 2 quart flasks) in a light, wooden box, like the casing for petroleum.

Straw hats.—Each fine hat is placed in a separate carton (box), and these cartons are put up together in paper packages of twelve. These packages, in turn, are put up in pine cases, papered inside, and the cases are then simply nailed, marked, and shipped. Braids (straw) are wound up in sections, each measuring 49 yards, and wrapped in blue paper. A small piece as sample is secured on the outside of each package. They are placed in cartons of one dozen or half a dozen, tightly boxed. Prior to the boxing they are carefully assorted according to qualities, and great care is taken in putting them up neatly and with compactness.

Works of art.—In packing works of art the box is made of one-inch boards, being in length and breadth about the same as the article to be shipped and of any required height. The case is then lined with large sheets of paper pasted to base and sides and straw or wood shavings forced in to keep the goods from being damaged by rubbing or chafing. The articles are then packed in firmly, each piece being well wrapped, and in case of framed pictures the frames are secured by screws to the box and each alternate layer is placed crosswise until the box is full. The outer protection is simply an open box or latticed casing made from strips of boards about 3 or 4 inches wide and about the same distance apart.

DUTIES ON PACKAGES.

The duty on mineral oils must be paid without deduction of any tare either on the interior or exterior cases at $6.37 per 220 pounds.

The duty on volatile oils or essences must be paid, without deduction of weight of the receptacle or vessel in which they are carried, at the following rates per 220 pounds. Rose essence, $8.68; orange and its varieties, 29 cents; other essences, 29 cents.

Compounded medicines not specified (without deducting vessel or casing), such as medicinal drugs mixed or mixed with pulp, juices, extracts moistened or dissolved with sirups, mucilages, spirits, etc.; also those mixtures in form of powders, dry pastes, either soft or liquid, artificial balsam, and effervescing magnesia pay $23.16 per 220 pounds.

Perfumery, without deduction of bottle or casing, pays $11.58 per 220 pounds.

Shoe blacking pays $1.16 per 220 pounds, casing included.

As I said in a former report* on the subject of petroleum—

> I would recommend to American refiners having large traffic abroad in the product the substitution of a case or package of possibly a unique or uncommon shape and bearing some brand or mark that could not be easily counterfeited or misunderstood. In this way the American oil would be known immediately, and no one would run any risk of being misled in its purchase.

Regardless of this statement, the customary tin and wooden casing, light as they are and consistent with safety, are the best so far to reduce the tariff cost to a minimum.

JAMES VERNER LONG,
Consul.

FLORENCE, *August 25, 1893.*

LEGHORN.

EN ROUTE FROM THE UNITED STATES.

Goods very seldom reach this consular district by steamers direct from the United States, but frequently by sailing vessels; in many instances, however, by transshipment in steamers from Glasgow, Marseilles, or Genoa.

LANDING AND WAREHOUSING.

Goods are landed by lighters.

Government warehouses are provided for the protection and storage of the goods.

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*No. 152, p. 102.

EN ROUTE TO THE INTERIOR.

The goods are loaded into railway freight cars alongside of the warehouses; but, if intended for Pisa, they are loaded here upon lighters, which are amply protected with coverings, and conveyed thither by canal, without being subjected to any handlings or usage en route.

OUTSIDE PACKAGES.

Dry goods.—These should have waterproof outside coverings and be very carefully packed in boxes or cases.

Groceries.—Canned should be packed in crates; sugar, coffee, etc., in bags.

Liquids.—Barrels or casks are most desirable. Petroleum is preferred in wooden cases, each containing two tin cans, each tin can to be about 9¼ by 9 by 13½ inches, and each to have, inclusive of the oil, a gross weight of about 16 kilograms (35¼ pounds) and a net weight of about 15 kilograms (33.06 pounds), leaving about 1 kilogram (2⅕ pounds) for the net weight of each can.

Iron manufactures.—These should be packed in cases.

Hardware.—Nails, screws, etc., should come in kegs; other hardware in strong boxes or cases.

ALEX. S. ROSENTHAL,
Consul.

LEGHORN, *October 10, 1893.*

MILAN.

Importers here agree that American merchants are already masters of the art of packing, that the merchandise always arrives in good condition, and that they can give no suggestions that will in any way improve the methods now in vogue.

EN ROUTE FROM THE UNITED STATES.

The principal articles imported into this district from the United States are cotton, petroleum, canned and bottled goods, biscuits, flour, seeds, and machinery.

The goods reach the district principally through the ports of Liverpool and Genoa.

WAREHOUSING.

Warehouses or magazines are provided by the Government to protect the goods from the elements.

OUTSIDE PACKAGES.

In regard to cotton and petroleum, it is impossible to give any definite idea of the best means of packing, as they reach here through subagents in Genoa and London.

Canned goods should be placed in boxes or chests from 3 to 5 feet in diameter, containing from thirty to forty-eight cans. Each can must be well wrapped in paper and placed in a chest lined, if possible, with straw. If canned and bottled goods are sent together in small quantities, they should be packed, with extra care and with excellent packing material, in barrels, these being the most convenient in loading and unloading and less expensive in regard to tariffs.

Biscuits, cakes, etc., should be placed in tin boxes from 3 to 5 feet in diameter and well packed in chests.

Flour, seeds, etc., should be packed in barrels lined inside with canvas or paper.

Machinery should be fastened to the center of a wooden box and closed around with quantities of the heaviest packing material.

DUTIES ON PACKAGES.

Customs duties, except certain ones fixed for sugars and coffee and those mentioned by the tariff, are charged on the net real weight for goods taxed less than $200 and upon the gross weight of other goods. Net real weight is what results after deducting the weight of the packing. Net legal weight is obtained by deducting from the gross weight the following tares:

Description.	Tares.	Description.	Tares.
For sugars:	*Kilograms.*	For coffee:	*Kilograms.*
Single bags	1	Single bags	1
Double bags	1.5	Double bags	1.5
Indian baskets	4	Bales	4
Barrels, casks, etc	6	Boxes and barrels	8
Heavy wood cases	5	Kegs and casks	8
Double straw mats	5		

GEORGE W. PEPPER,
Consul.

MILAN, *September 14, 1893.*

PALERMO.

EN ROUTE FROM THE UNITED STATES.

Goods reaching this district from the United States come, in the main, by direct steamers. Some are transferred at English ports, where they are subjected to such handlings as are required by the transfer. The principal imports from the United States are petroleum, lard, lumber, and staves.

LANDING AND WAREHOUSING.

Only vessels laden with grain are moored alongside the wharf; others are unloaded by means of lighters and small boats. These vessels are anchored three-fourths of a mile from the wharf.

Warehouses are not provided. If it should rain when the vessel is unloading, goods are liable to damage during their transfer from vessel to wharf. At the wharf they are put under a shed till it ceases to rain; then they are taken to the custom-house.

EN ROUTE TO THE INTERIOR.

Goods are shipped by rail to the interior, there being three lines of railway. Pack horses are little used, but when they are used the articles are put in saddlebags made for the purpose. A horse can carry 500 pounds.

OUTSIDE PACKAGES.

For dry goods, the best material for covering is a box or an outside covering of canvas with an inside covering of oiled canvas or paper; for groceries, sacks or boxes; for liquids, barrels and tins; for iron manufactures and hardware, if in small pieces, canvas; if fine goods, kegs or boxes.

DUTIES ON PACKAGES.

There is no charge for boxes, kegs, etc., when they contain goods.

Customs duties on dry goods are charged on the net weight.

On groceries, iron manufactures, and hardware, on which the duty is less than 20 lire ($3.86) per 100 kilograms (220 pounds), the duty is collected on the gross weight; the same paying a duty of from 20 to 40 lire per 100 kilograms pay on the gross weight, with a tare of from 8 to 15 per cent; all paying more than 40 lire per 100 kilograms pay on the net weight. Liquids, if in casks or barrels, pay on the net weight. For petroleum in tins protected by a wood covering a tare of 12½ per cent is allowed.

WILLIAM H. SEYMOUR,
Consul.

PALERMO, *November 20, 1893.*

ROME.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach the consular district of Rome by rail via Genoa, Leghorn, and Naples. Petroleum comes also via Civita Vecchia and Ancona. Goods generally arrive in very good condition, as the steamship and railroad companies are responsible for damages.

LANDING AND WAREHOUSING.

At Genoa goods are landed at the wharves. At Leghorn and Naples they are landed by means of lighters when wharf room is insufficient. At Cagliari, Ancona, and Civita Vecchia goods are always landed by lighters. Crates and heavy articles are hoisted by derricks at Genoa, Naples, and Leghorn. Italian stevedores are very skillful and expert in handling freight and use great care.

Warehouses are always provided and goods do not remain unsheltered. At Civita Vecchia, however, iron, coal, wheat, jute, etc., in cargo lots are exposed to the elements.

EN ROUTE TO THE INTERIOR.

From Ancona and Civita Vecchia goods are shipped to the interior by rail. Cartage is required from the wharf to the railway station.

OUTSIDE PACKAGES.

Packages should be waterproof when the contents are liable to become damaged by dampness. Cases containing paintings, for instance, should be baled. Glass and china packed in barrels generally arrive in good condition.

Dry goods should be packed in strong, but light, seasoned pine boxes, strapped, and lined with tin.

Sugar and coffee come in bags; other groceries are canned and packed in crates.

It is a wise precaution to put wine and spirits in double casks or kegs to prevent the contents from being tapped.

Iron manufactures should be packed in kegs or barrels or bound in strong cords of straw, and hardware in kegs or strong boxes.

The above manner of packing the articles named meets with the local requirements.

DUTIES ON PACKAGES.

Customs duties are not charged on the box, keg, etc., but are specific and are charged on the net weight of the goods.

The Italian Government discourages shipments in bond from seaports to interior custom-houses. At each port there is but one agent for the shipment of goods in bond. The bonding dues are from 7 to 10 lire ($1.35 to $1.93) per ton. If the railroad company assumes the agency, the company becomes responsible to the Government for the payment of customs dues at the interior points.

There is no duty on used wearing apparel or passengers' baggage, even when the packages are not accompanied by the passenger.

WALLACE S. JONES,
Consul-General.

ROME, *October 13, 1893.*

MALTA.

EN ROUTE FROM THE UNITED STATES.

In the aggregate a pretty fair quantity of American goods is imported into this island. Owing to the absence of direct communication with the United States, these goods are received via Liverpool and other English and

European ports, and, as such ports are credited with the exportation, it is difficult, except in cases where the goods are obviously of American production, to testify to their origin. There can be no doubt as to such articles as petroleum, leaf and plug tobacco, pork, ham, bacon, cheese, flour, lard, sewing machines, perfumery, hardware, and certain sundries being of American production; but I can not decide as to whether any appreciable quantities of dry goods, liquids, iron manufactures, and the higher class of Yankee notions find their way here from the United States. In driblets and in larger or smaller quantities they certainly do come here, but in many instances after having been repacked in other ports.

Such packing as I have seen and examined of those goods that are notoriously American does not, in my estimation and in the opinion of the importers consulted, leave anything to be desired. All that is necessary is to pack in the ordinary way, but securely, snugly, and stoutly, to resist the tumbling and knocking about that generally takes place at the port of transshipment.

LANDING AND WAREHOUSING.

The goods are landed at this port from the vessels by lighters. Some of the steamship companies land the goods themselves on the wharves or under regular freight sheds on the wharves, whence they are received by the consignees. But in most cases the goods are received direct from ships' tackles by consignees on boats or lighters and conveyed to their own storehouses. In wet weather tarpaulins are freely and effectively used. The few sheds along the wharves are public property and are managed by the Government, and the landed goods are allowed to remain in the sheds or on the wharves free of charge for a reasonable time. The goods landed and left on the wharves are exposed to the elements, but the ordinary precautions in the way of dunnage and tarpaulins are always taken, principally during the winter months, the only rainy season in the islands.

The port of Malta, having been up to quite recently the emporium of the Levant and Barbary coasts, is provided with excellent and vast private storage accommodation. Dutiable articles are stored in extensive Government bonded warehouses.

EN ROUTE TO THE INTERIOR.

The goods imported and sold in the island are repacked in the capital town—Valletta—or in the "Three Cities," whence they are removed on carts in small quantities to the villages and wayside-shop purchasers throughout the island. The "Three Cities" are the three busy and very thickly populated towns of Vittoriosa, Burmola, and Senglea, which lie in a cluster on the east side of the Grand Harbor, while Valletta occupies the west side.

The carts that convey packages to the interior—strong, springless, two-wheeled vehicles—are always provided with tarpaulins and binding straps and are drawn by large mules.

Customs duties are not charged on boxes, kegs, etc.

JOHN WORTHINGTON,
Consul.

Malta, *October 26, 1893.*

NETHERLANDS.

AMSTERDAM.

EN ROUTE FROM THE UNITED STATES.

American goods reach this district by steamer or sailing vessel direct to Amsterdam or via Rotterdam, Hamburg, Bremen, Antwerp, and England. En route the goods are subjected to the usual handling aboard ship, such as loading, stowing, and landing, either by hand or steam power.

LANDING AND WAREHOUSING.

Most of the goods are landed on the pier and immediately placed in warehouses. Such goods as can not be stowed in warehouses are left in the open, but they are carefully protected from the elements by sheds and tarpaulins.

EN ROUTE TO THE INTERIOR.

Goods are forwarded to the interior by barges or steamers and by rail. Both on land and water great care is taken to protect the merchandise from the inclement weather. The vast system of canals that permeates Holland affords excellent means for cheap transport.

OUTSIDE PACKAGES.

As to the best material for outside covering, the variety of goods imported here from the United States renders difficult a definite reply.

The package, if possible, should be waterproof. Cases made of grooved boards are preferable; they afford an extra precaution against rain. The ends and the sides of the cases should be strengthened with iron bands. Where the nature of the merchandise permits, bales should be absolutely avoided as a means of packing, on account of the danger liable to result from the hooks used in loading and unloading.

Too great care can not be taken in marking in large and plain letters the destination of every bale, case, parcel, or barrel of merchandise. Lack of direction or misdirection frequently causes delay and loss.

By the local importers I am informed that the American manufacturers and exporters are fully aware of the importance of the proper method of preparing goods for transatlantic shipment, and the skill displayed in this respect is highly commended.

DUTIES ON PACKAGES.

Duty is never charged on the packing material. A certain rather liberal allowance is made from the gross weight.

If net weighing is desired, it will be allowed at a little extra cost. In general it is better not to ask for net weighing, unless the package is unusually heavy. On most goods duty is collected ad valorem.

EDWARD DOWNES,
Consul.

AMSTERDAM, *November 15, 1893.*

PORTUGAL.

LISBON.

EN ROUTE FROM THE UNITED STATES.

American merchandise reaches Lisbon direct from New York, also via England. If transshipped, the goods are subjected to two handlings. They usually arrive in good condition.

LANDING AND WAREHOUSING.

Goods are unloaded into lighters and thence to wharves of the custom-house.

Warehouses are provided. No risk of damage is incurred, as a rule, from exposure, other than by detention on board lighters.

OUTSIDE PACKAGES.

If original packages are well made, waterproofing is not necessary, except in case of delicate goods, machinery, etc., liable to damage through exposure to the air.

Buyers, when ordering, usually give sellers and shippers instructions regarding packing. Goods liable to breakage in transit should be well secured to their cases and wrapped in straw, excelsior, or some other material to lessen the risk of damage from falls, knocks, or blows.

Dry goods.—The best mode of packing is in bales or cases, as employed in the United States.

Groceries.—Very few groceries are imported direct from the United States. Canned goods should be in cases.

Oils.—Lubricating oils should be shipped in barrels of 40 or more gallons each; illuminating oils in barrels of 42 gallons and in cases containing two 5-gallon tins.

Hardware.—Small goods, such as files, tools, etc., should come in kegs or cases; bar iron, steel, copper, etc. (long pieces), in bundles covered with bagging; large sizes, loose.

DUTIES ON PACKAGES.

Duties are in some cases charged upon tares, such as fine wines, liquors, perfumery, etc. Generally, there is an allowance made for tare where this can not be accurately ascertained without unpacking goods and causing damage to them. As far as possible, actual tares are taken when specific duties are charged.

J. B. WILBOR,
Vice-Consul-General.

LISBON, *August 10, 1893.*

RUSSIA.

FINLAND.

I inclose reports on the packing of agricultural implements and machinery, groceries, and goods in general. Regarding the packing of dry goods, hardware, etc., I have been unable to get any specifications from dealers in those articles, but I give some details from my own experience.

DRY GOODS, LIQUIDS, AND GLASSWARE.

Dry goods should be packed in strong cases lined with oilcloth, in order to prevent any possible damage from damp.

Liquids in casks ought to be shipped in double casks, and liquids in bottles should be surrounded with straw in ordinary strong packing cases containing one dozen bottles each.

Glass and china should be very carefully packed in hay and straw and distinctly marked, "Glass, with care."

GROCERIES.

Mr. N. Pletschikoff, grocer and warehouseman, supplies the following information:

The following goods imported from America are used in my business: Coffee, packed in bags of about 60 to 70 kilograms; rice, in double bags of about 70 kilograms; American ox tongue, twenty-four tins to each box; compressed corned beef, twelve or twenty-four tins to each box; Bahia pineapples, in boxes of twenty-four tins of one kilogram each; American salmon, in boxes of forty-eight tins of half a kilogram each.

Up to this time no other American articles have been used in my business. It is my opinion that if a specification of such articles as might possibly be suitable for the market in Finland could be obtained from America, it would be easier to furnish the information required.

AGRICULTURAL MACHINERY FOR HELSINGFÖRS.

Mr. P. Sidorow, an agent for machinery and agricultural implements at this place, supplies the following:

The goods are transported the whole way by sea from New York to Helsingförs, and are stowed in the ship under the deck.

Goods are landed from the steamer direct on the harbor quay.

Goods remain upon the quay in the open air until they have been cleared at the custom-house, after which they can be removed.

The goods are unpacked in Helsingförs and the machines put together, after which they are sent off from here, without being packed, by rail or steamer.

Machines should be packed by the exporters in strong, tight packing cases, and, as the goods are reshipped in England, it is of great importance that they should be packed with the utmost care, as it frequently happens that goods arrive in a broken condition in consequence of not having been firmly secured inside the cases. As machine goods packed in packing cases are often exposed to hard knocks, they ought to be very strongly secured in the cases by means of screws and blocks of wood so that they may not be shaken loose during loading and discharging.

There is no duty on the packing cases, but, as the custom-house declaration in Finland is usually made according to the net weight stated in the bill of lading, it is especially important that this should be given exact, and not taken approximately, for if it is taken too high the importers here have to pay more duty than is necessary.

The consular agent at Abo, Mr. Forselius, reports as follows for that port:

Goods from the United States are generally sent over from England by steamers direct to this place.

Goods are generally landed at wharves, but sometimes, when the steamers are deep, by lighters, in order to be transported up the river to the custom-house warehouses.

Before duty is paid the goods are under the charge of custom-house and storehouses.

Goods are forwarded to the interior by rail and also by pack horses. The length of the package or box should not exceed 4 meters and the weight 300 to 400 kilograms.

The best outside coverings are boxes and barrels; they need not be waterproof.

HERMAN DONNER,
Acting Consul.

HELSINGFÖRS, *September 30, 1893.*

RIGA.

EN ROUTE FROM THE UNITED STATES.

The principal goods imported from the United States into this district consist of hardware. These goods do not arrive here in vessels direct from the United States, but are transshipped in some English, German, or Danish port.

UNLOADING AND LANDING.

The goods are landed here at the custom-house wharf, where warehouses are provided.

EN ROUTE TO THE INTERIOR.

For the interior the goods are loaded direct into the railway wagons, the custom-house quay having tracks in connection with the different railway stations. In order to meet all requirements, a waterproof tarpaulin covering is desirable.

DUTIES ON PACKAGES.

As regards customs duties, it is immaterial how the goods are packed.

The experience here is that the packing of goods from the United States is done with great care and in the most economical way as regards space.

PETER M. SIMONI,
Acting Consul.

RIGA, *August 26, 1893.*

ST. PETERSBURG.

EN ROUTE FROM THE UNITED STATES.

American goods come to Russia, speaking generally, by way of Hull, London, Hamburg, Stettin, Bremen, Copenhagen, and other European ports, where they are transshipped, there being no direct steamship line between the two countries. Only in case of full steamer cargoes of cotton or other merchandise are goods laid down in Russia without one or more transshipments. In winter goods are shipped by rail from Hamburg or come from Hull by ship to Revel and thence by rail to St. Petersburg, Moscow, and the interior.

LANDING AND WAREHOUSING.

Goods are landed at St. Petersburg at wharves, in warehouses, or by lighters. The latter method is used only when goods are to be brought directly to the manufacturers or works or to the town port, to which point the large vessels do not come. The rule that obtains in this matter is simply this: The vessels must deliver and discharge their goods according to the conditions mentioned in the bill of lading.

On discharging at the new port, that is, at the Goutouer Basin, goods will be warehoused either in closed or in open places, according to the orders of the consignee, which will depend upon whether he desires to pay rent for closed warehouses or only for open storage. The difference in the cost is so considerable that in general it may be said that merchandise in bulk, such as clay, cotton, earth, machinery, soda, resin, brimstone, dyewoods, turpentine, or, in a word, such goods as are not liable to be damaged by the elements, are stored in the open. In such cases, however, it should be definitely agreed that the goods should be stored upon well-laid plank bottoms, as the ground at the new port is soft and marshy, and that they should be thoroughly protected with waterproof covers.

EN ROUTE TO THE INTERIOR.

Goods intended for shipment to the interior of the Empire should be laid down at the new port, St. Petersburg, whence they will be forwarded to their respective destinations. Such goods as are intended for delivery to the consignee in the town are, after clearance from the custom-house, transported by carts, generally carrying about 60 poods (about one ton); but there are transfer wagons which carry as high as 1,500 poods (about 24 tons). Goods are shipped to the interior by rail or river craft, and beyond the reach of these, by cart or sledge. For transport over long distances by carts or sledges packages should not weigh more than 150 pounds each, this being the accepted load for a horse. In case of pack-horse transportation, the parties carrying the goods are required by local regulations to protect them from all damage from the elements.

OUTSIDE PACKAGES.

The information herewith given concerning outside packages is based upon observations and suggestions by the principal commercial houses of this city, including the general forwarding and shipping agents.

Goods intended for Russia may in general be packed in the same manner as for exportation to other European countries, there being no special rules for any line of goods as concerns this Empire, except that the packing and packing materials should be stronger, because of the longer sea voyage and transshipments, and with the further exceptions that when goods are composed of different classes of materials, as in the case of hardware, which includes, for example, parts of glass and porcelain, it is necessary to divide them up, each material being packed by itself. According to common report, American goods are laid down in Russia in very good condition. For example, grass seed is shipped in bags of excellent quality ; so also are dried apples and coffee. Iron and hardware, machinery, tools, and liquids in bottles and in cases are always well and securely packed. In fact, I have learned of but few instances where the packing is unsatisfactory.

American and Egyptian cotton bales.—In the case of raw cotton the complaint is general that the bales arrive in very bad shape. In many instances the iron hoops are entirely broken and the covering worn out, thus necessitating much extra trouble and entailing considerable loss. In this particular American cotton bales are compared very unfavorably with the Egyptian, which invariably arrive in excellent condition and perfectly clean. The Egyptian bales are only about half the size of the American, and are wrapped in heavy linen covers and securely bound with iron hoops. The number of hoops on a bale of Egyptian cotton is greater than that on an American bale, notwithstanding the difference in size. The Egyptian cotton has equally rough sea voyage and handling as the American.

Resin barrels.—Another cause of complaint pertains to the method of packing resin, shipped from Savannah, Galveston, Baltimore, and New Orleans. This line of goods is sent in barrels of very poor quality, held together imperfectly with wooden hoops. Very generally these goods are received in the interior in exceedingly bad condition. Mr. Pollitz, who is one of the largest importers of this line of goods, recommends that resin and similar articles be packed in better barrels, bound with strong, iron hoops. This gentleman reports that some American shippers pack their goods in this latter way, and as a result they invariably reach their destination in perfect order.

DUTIES ON PACKAGES.

The schedule of import duties in Russia is subject to sudden and frequent change. In general, it may be said that duty is not levied on packages. All duties are specific. However, such articles as are received in bulk, as well as those received in casks, where it is difficult or impossible to determine the net weight, pay duty on the gross weight, as, for example, sarsaparilla, copper, and the like. Bills of lading should always contain accurate gross weight, tare, and net weight of the whole parcel, and each package should be detailed in the specification. If, however, the packing should consist of any sort of valuable material, which in itself might be a subject of separate import, duty would be charged on it. For example, if the packing should be of tin, duty would be charged thereon. This question is so complicated that it is practically impossible to answer it without furnishing the entire list, consisting of about six hundred classes, with reference to allowances for tare and discounts of gross weights, and without giving also a practically complete résumé of the Russian tariff.

DUTY ON COMPOSITE GOODS.

Duty on composite goods is levied at the rate of the most expensive of the component parts. Thus, in hardware a portion of which is brass the duty would be levied as if all were brass, making the amount of duty in such case double or treble what it would be if the iron and brass were packed separately. In machinery a moderate amount of brass, bearings, etc., is allowed to pass under the designation of complete machinery; but if the proportion of brass is large, say one-third of the total weight, then the entire machine would be charged as brass.

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *November 28, 1893.*

WARSAW.

All the goods shipped to this district from the United States reach their destination from ocean steamers direct by railroads.

All the railroad stations are provided with well-protected magazines.

The opinion of the merchants in this country is that the outside covering on the goods shipped from the United States is now superior to that from all other countries.

There are no customs duties charged in this country on the outside covering of imported goods.

JOSEPH RAWICZ,
Consul.

WARSAW, *August 11, 1893.*

SPAIN.

BARCELONA.

EN ROUTE FROM THE UNITED STATES.

Only tramp vessels or specially chartered vessels come to this port direct from the United States. Goods coming otherwise are forwarded by ship from English, French, Italian, and other ports.

UNLOADING AND LANDING.

The port of Barcelona is a mile long, and its greatest width is about 3,500 feet. The depth of the water varies from 12 to 45 feet. During the year 1892 the number of vessels that entered the port was 3,574 and their tonnage 2,285,611. The larger vessels are discharged by lighters; the smaller ones land their goods at the wharves. The cost of landing goods by lighter is about twice as great as that of landing them at the wharves.

WAREHOUSING.

As very little rain falls during the year at Barcelona and as plenty of warehouses are provided for all kinds of goods there seems to be comparatively little necessity for providing goods with waterproof coverings. From the wharves or warehouses to the railway stations the distance is short, and the goods are carried in trucks with the usual degree of care. The cost of a truck for each trip is 40 cents, and the wages of each lighterman is $1.25 and of each wharfman $1 per day.

OUTSIDE PACKAGES.

The best methods for packing, in the estimation of merchants here, are: Dry goods, in wooden boxes with iron bands; groceries, in barrels, boxes, bags, and tins; liquids, in tin-lined barrels or boxes; iron manufactures, in wooden cases with interior props of wood or iron and with exterior iron bands; hardware, in cases of wood. The best covering known here is tarpaulin.

DUTIES ON PACKAGES.

Duties are charged on all boxes and barrels and tins, and, as a general rule, the lowest duties are imposed on wood. Americans, however, should avoid making any contracts binding them to get their goods through the custom-house here and to deliver them at the stores of the purchasers. The Spanish customs laws are difficult to understand.

HERBERT W. BOWEN,
Consul.

BARCELONA, *September 20, 1893.*

CADIZ.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States—staves, lumber, and petroleum excepted—reach this district by steamer via Liverpool, London, and Hamburg, where they are largely imported by commission houses which send out their travelers to Spain to collect orders for different articles. On arrival at the European ports, the goods are unloaded and reëxported in parcels according to the requirements for filling orders from Spain. Staves and lumber are brought over direct either by steam or sailing vessel. Alcohol in 50-gallon casks and refined petroleum in tins were formerly also imported here by sailers, but this has ceased in consequence of the exorbitant import duty on these articles. Crude petroleum, however, is imported at Seville, where of late large refineries have been established. It goes there now in tank steamers specially provided for that purpose.

LANDING AND WAREHOUSING.

All merchandise—heavy machinery and sometimes staves excepted, which are unloaded at the Puntales railway pier—is discharged in the port of Cadiz on to lighters. At Seville vessels drawing not over 16 feet discharge at the wharf.

Dry goods in general, hardware, etc., are stored in the custom-house immediately after they are landed in Cadiz; liquids, grain, and machinery, however, have to remain on the wharf and are exposed to the elements during their clearance through the customs. At Seville warehouses are provided on the wharf for all kinds of goods.

EN ROUTE TO THE INTERIOR.

Goods are forwarded to the interior generally by rail, carts, and pack mules. The handling and usage they are subjected to en route are much the same as on railways in general, with the exception, perhaps, that they do not travel here as fast as they do in other countries. Two-wheeled carts covered with oiled canvas and drawn by mules travel along the highroads, and pack horses, mules, and donkeys to smaller inland places. A muleteer conducts about six or eight animals—horses, mules, and donkeys—each of which carries on either side a package, bale, or bag, tied with ropes, weighing from 50 to 150 pounds each. The size or shape of such packages are of little consequence, provided they do not weigh more than the strength and size of the animal allow. For instance, a strong mule can carry two bags of shot of 150 pounds each, as well as two enormous bales of cork wood of the same weight, as long as these are properly tied together loose enough to allow them slightly to hang over each side of the animal's back. Mules, as well as horses, get over the narrowest and steepest roads here.

OUTSIDE PACKAGES.

Outside coverings are acceptable, whether cases, bales, barrels, or bags, precisely as such coverings are used for other countries. Packages of goods of delicate nature should always be waterproof, to prevent their being damaged by moisture or sea water. German and French packers make much use of waterproof paper wrappings.

Dry goods.—As already mentioned, dry goods are mostly received here through foreign importation, packed much in the same style as for other European countries. All the large towns in Spain are accessible by rail or highroads.

Groceries and cereals.—In general, groceries and cereals (wheat, beans, maize, oats, barley, flour, etc.), are transported through Spain in sacks and bags of about 100 kilograms* each. Sugar from Manila comes in cane matting; from Habana, in bags and cases. English and American hams are imported with canvas cover packed in barrels. American lard, brought here through commission houses in Liverpool, is made up in tins of about 25 kilograms each, and two tins placed in a wooden box.

Iron manufactures.—The least possible space should be taken, and a substantial preservation from damage and breakage should be sought. It is advisable that large pieces of machinery be packed in various parts.

Hardware.—Like dry goods, etc., hardware is forwarded in small parcels only to inland places not accessible by rail or roads. These articles, consequently, may come here packed as is customary for other European countries. The Germans and Frenchmen, it is thought, pack their hardware better than do English manufacturers. In general, hardware is unpacked by importers here and repacked later to suit the requirements of their retail trade with towns and places in the interior of Spain which do not buy direct from abroad.

DUTIES ON PACKAGES.

There is no duty charged on common wood boxes; but on inside paper boxes and outside paper covers, etc., of any material specified in the Spanish tariff the corresponding duty is applied. The first inside wrapper, however, is free of duty. Duty is charged on all casks, hogsheads, etc., which are serviceable again after being emptied; and if reëxported within six months after arrival in Spain, the duty is refunded. Such duty affects, of course, to some degree the cost of the goods imported.

A. J. BENSUSAN,
Vice-Consul.

CADIZ, *October 28, 1893.*

GRAO.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States destined for this district are generally shipped by way of England, for lack of direct communication. Such transshipments suffer greatly; constant claims and serious losses are reported from merchants here. This does not refer to crude petroleum in tank vessels and lumber, staves, and phosphates, which are shipped direct and come in entire cargoes, loose, without need of packing.

LANDING AND WAREHOUSING.

The landing of goods at this port is done by lighters.

There are no warehouses on the wharf, and goods are liable to be exposed to the elements, with the exception of small parcels and single boxes, which enter the custom-house at once.

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* 1 kilogram = 2.20485 pounds.

EN ROUTE TO THE INTERIOR.

There are suitable carts, vehicles, and railroad communication for the transportation of goods to the interior.

OUTSIDE PACKAGES.

Dry goods are not imported here from the United States.

Groceries, which come in tins, glass bottles, wooden pails, or linen covers, should all have an outer barrel, cask, box, or case of strong manufacture, without necessarily being waterproof.

Liquids, if valuable and in small kegs, should have an outer cask for protection against breakage and pilfering; if in larger quantities, a strong barrel is sufficient; if in bottles, straw covers and a sufficiently strong box.

Large pieces of machinery should come in strong crates; smaller pieces should be wrapped in paper and packed in well constructed boxes.

Hardware comes in paper and straw and an outer box as strong as possible.

Sausage casings should be well salted and put in strong barrels.

DUTIES ON PACKAGES.

The duties on the various articles are charged here in the following manner:

Dry goods pay on the net weight.

Groceries pay on their inner covering, *i. e.*, tins and bottles are included in conserves; lard obtained by fusion includes wooden pail, barrel, or case; lard obtained by pressure is prohibited; hams and bacon include cloth coverings. The outer boxes pay no duty.

Liquids pay on the net contents; the barrel pays an extra duty; bottles pay extra duty as glassware.

The duty on machinery includes the outer box or crate; on smaller pieces their wrappers of paper or straw are included.

Hardware includes the inner wrapper of paper, straw, etc.

Sausage casings pay duty on the gross weight.

Resin pays on the gross weight.

THEODOR MERTENS,
Consular Agent.

GRAO, *August 12, 1893.*

MALAGA.

I have conversed with the principal grocers of this city interested in American packing, and all agree that the answers herewith meet the requirements of the circular.

EN ROUTE FROM THE UNITED STATES.

There are no goods brought direct to this consular district from the United States except staves, petroleum, and cotton, which are brought by vessels flying foreign flags. All other American goods come to Malaga by way of England. The goods arrive in perfect condition.

LANDING AND WAREHOUSING.

Goods are landed by lighters.

Staves are landed on the wharf, and from thence taken in carts to suitable field depots and are kept in the open air. Bales of cotton are also landed on the wharf and deposited under roof, and from thence placed in carts and conveyed to the factories, where they are deposited in suitable stores for the purpose. Petroleum is deposited on landing in proper stores, under roof, outside the limits of the city.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by railroad, and are handled with great care.

OUTSIDE PACKAGES.

Grocers of high standing here admit that the packages which cover American goods arrive in perfect order and condition. However, they say that American hams and bacon are generally packed in a rather fresh condition, hence the outside is sometimes covered with a kind of greenish substance; but the packing, both inside and outside, is most perfect.

DUTIES ON PACKAGES.

Duty is imposed as follows: Petroleum, on the box, tin, and liquid separately; machinery, on the gross weight, including packing; cotton, on the gross weight; canned goods and preserves, on the net weight; hams, bacon, and lard, on the gross weight, including packing.

THOMAS R. GEARY,
Acting Consul.

MALAGA, *September 1, 1893.*

SWEDEN.

STOCKHOLM.

The articles imported into Sweden are principally cotton, petroleum, leather, pork, wheat, and corn, thus making boxes (except for pork) unnecessary.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach this district generally by way of Gothenberg, either by steamer or rail.

LANDING AND WAREHOUSING.

Goods are usually landed at the quay; seldom by lighters.

Warehouses are provided, but very often goods are covered with tarpaulins after landing.

EN ROUTE TO THE INTERIOR.

Goods are conveyed to the interior mostly by rail, but also by pack horses. The size of the packages should not be any larger than 2 cubic yards, and their weight should not be greater than two men can carry—about 400 pounds.

OUTSIDE PACKAGES.

The outside material depends greatly upon the character of the goods. If convenient to the shipper, a wooden cover is preferred. The merchants do not consider it necessary that packages should be waterproof.

DUTIES.

No customs duty is paid for outside packing.

CARL P. GERELL,
Vice-Consul.

STOCKHOLM, *August 28, 1893.*

SWITZERLAND.

BERNE.

Upon inquiry, I find that only the following articles are directly imported into this consular district from the United States: Conserves, wine, coal oil, writing machines, and pianos. These articles are generally shipped by the Red Star line to Antwerp, from which place they are reshipped by railway direct to their destinations.

For conserves, writing machines, and pianos the outside packing should be a wooden box of good material, strong enough to carry the inside weight. I am informed that sometimes these boxes have been of inferior material, and in consequence the goods have become damaged. Wine and coal oil are shipped in barrels, and the receivers of these articles are satisfied with the packing.

Customs duties are charged on the gross weight of all articles imported into Switzerland; nevertheless the package should be strong enough to carry the goods safely.

JOHN E. HINNEN,
Vice-Consul.

BERNE, *August 24, 1893.*

GENEVA.

I find that the importation of American goods by Genevese and other merchants of the district is of such insignificant proportions, comparatively, that I can learn nothing on the subject of sufficient interest or importance to report at length.

The principal direct importations of Genevese merchants from the United States are almost entirely confined to lard, petroleum, potted meats, condensed foods for infants, and patent medicines. These goods all come skillfully packed in cans and boxes and are not subjected to exposure en route.

Swiss duties are assessed by weight; consequently the lighter the package the smaller the duty.

The duties on the class of goods coming here are as follows, per 100 pounds: Potted meats, $19.30; bottled sauces, $9.20; lard, 98 cents; petroleum, 24 cents.

Merchants here tell me that the present system of packing these goods can not well be improved upon. The only way to lessen the duty is to lighten the package.

BENJAMIN H. RIDGELY,
Consul.

GENEVA, *September 9, 1893.*

ST. GALL.

I am informed at the custom-house here that no goods from the United States are received direct; that comparatively few American goods come at all to this consular district, and that such as do come are ordered from Basle and Hamburg. No report, therefore, upon the kind of packing best adapted for American goods to be exported to this district in particular would seem to be practicable. Such American goods as reach St. Gall from the points in Europe above named are, I am told, uniformly well and satisfactorily packed.

IRVING B. RICHMAN,
Consul-General.

ST. GALL, *August 14, 1893.*

TURKEY IN EUROPE.

CONSTANTINOPLE.

EN ROUTE FROM THE UNITED STATES.

The goods imported from the United States into this place are pumps, clocks and watches, agricultural implements, petroleum, patent medicines, rum, shade rollers, lamps, canned goods, stoves, hardware, and some crockery. All these goods reach this district by transshipment in England, France, or elsewhere in Europe, most of them coming by English steamers through Liverpool, some via London by the French Messageries steamers, and very few via Hull and other routes. The goods are, of course, subjected to severe handling and usage en route. Only petroleum comes here direct, mostly on sailing vessels.

LANDING AND WAREHOUSING.

All goods landed from vessels at this port are landed by lighters.

Warehouses are provided to some extent, but as a rule goods remain several days in the lighters and are more or less exposed to the elements. Tarpaulin and canvas are used by some lighters to protect the goods, but this is not efficient as a protection against the elements.

EN ROUTE TO THE INTERIOR.

Goods shipped to the interior go either by railroad, cart, or on the backs of mules and camels. Goods sent to the various ports of Turkey are transshipped at this port, as the English and French steamship companies have made arrangements with the other companies engaged in the coast trade. Goods shipped to the interior are subjected to very severe handling and usage en route, especially those going by carts or on the backs of mules and camels. The size of packages can not be fixed, but must be determined by the shipper. The weight suitable to meet requirements is as follows: Mule packs, 360 pounds in two packages; camel packs, 600 pounds in four packages; man packs, 180 pounds in one package.

OUTSIDE PACKAGES.

The package should be a bale, box, keg, barrel, sack, or bag, according to the nature of the article. All goods subject to injury from dampness must be packed in waterproof packages. The best method of packing used in the United States will meet the requirements here. In this connection, I wish to quote a few suggestions made by a well-known merchant here who imports American goods regarding the packing of stoves. He says that in packing stoves for this market it would be better to leave them without outside packing and have them well tied up. The smaller pieces should all be well packed in a strong barrel or box, with straw, etc.

Boxes, barrels, and kegs of strong, plain wood are very satisfactory for dry goods, groceries, crockery, glassware, and hardware; but bales, bags, or sacks may be used for such articles as will not be damaged by breakage. All heavy goods, such as boilers, etc., ought to be packed loose like agricultural implements. The same merchant says that lamp goods are generally packed in second-hand barrels or hogsheads and arrive here shaky and broken. These goods ought to be placed in strong packages. Boxes used for packing shade rollers for this market are not strong enough to stand the long voyage. Patent medicines, pumps, and agricultural implements reaching this district are well packed and come in satisfactory condition.

DUTIES ON PACKAGES.

No customs duties are charged on the outside packages, but, as freight is charged not by weight, but by cubic measurement, all unnecessary outside packages should be avoided, in order that freight expenses may be saved.

WILLIAM B. HESS,
Consul-General.

CONSTANTINOPLE, *August 24, 1893.*

UNITED KINGDOM.

BELFAST.

EN ROUTE FROM THE UNITED STATES.

Although large quantities of American goods and manufactures are used and consumed in Belfast and the surrounding district, the quantity imported direct from the United States is inconsiderable, the greater portion being shipped to Liverpool and Glasgow by the regular Atlantic liners and reshipped thence by coasting and cross-channel steamers to Belfast.

There is one line of cargo steamers—the Lord line—which ply periodically between this port and Baltimore, carrying miscellaneous freight or ballast on the outward voyage. The usual cargo on the return voyage is breadstuffs. I have been informed by some of the importers that flour is sometimes subjected to very rough handling, both in transit from inland to seaport and in reshipping for transatlantic passage. An occasional cargo of oil, lard, glucose, etc., is also brought by the Lord liners to this port.

UNLOADING AND LANDING.

All goods discharged from vessels in Belfast harbor are landed on the quays and are either taken therefrom by the consignee in carts or vans at the time of landing or, if not so removed, are trucked into sheds provided by the harbor commissioners, where they remain subject to the traffic regulations. Flour in bags is hoisted in slings from the hold to the ship's deck, whence stevedores remove it to the adjoining sheds.

WAREHOUSING.

The harbor commissioners have provided sheds on the quays and within a few feet of the vessel when berthed for temporary storage purposes, but no warehouses. The sheds are roomy, well built, storm and water proof, and are well guarded by the harbor police and watchmen.

EN ROUTE TO THE INTERIOR.

No goods of any consequence are destined directly for the interior of Ireland, the smaller towns being supplied by the wholesale merchants here and in other large cities and seaports from their own warehouses. The goods are almost entirely carried by rail. The tracks run alongside of the sheds and are so conveniently close to the vessel when docked that merchandise is often transferred direct to the freight cars. A small portion is shipped by canal on lighters to some towns in the immediate vicinity of Belfast.

OUTSIDE PACKAGES.

Flour is shipped to this port in cotton and jute bags. Barrels are undesirable, because of easier breakage and leakage and consequently greater loss, besides being bulkier and less convenient to handle. Jute bags are the most desirable, although the importers seem to agree that if a good quality of cotton is used it will answer every purpose and be cheaper than the jute. Considerable loss is sometimes sustained by weakness of the cloth, and also by the poor quality of the twine used in sewing up the mouths of the bags. Bags should in all cases be as nearly waterproof as possible; those weighing 140 pounds are the most convenient for handling.

There seems to be considerable loss by leakage in the shipment of liquids in barrels, no matter how carefully the barrels have been stowed, and it is desired by the importers that they should be made stronger and more strongly hooped.

Machinery or hardware of any description arrives in better condition if shipped in tight, wooden cases, and, if the form of the article will allow, the bright parts should be done up in waterproof tarpaulins or tarred canvas.

Large quantities of tobacco are shipped to Belfast, but always via Liverpool, Glasgow, or London. It is packed in wooden boxes or casks, which afford quite sufficient protection and seem in every way satisfactory.

DUTIES ON PACKAGES.

There is no duty whatever charged upon boxes, casings, or coverings of any description coming into the United Kingdom.

LONDONDERRY.

As Londonderry is an important port of entry and within this consular district, I have had the consular agent there prepare answers to the Department's interrogatories and append hereto such parts of his report as may be of value:

Goods from the United States destined for the port of Londonderry are generally carried by cargo steamers from New York, Boston, Baltimore, and Savannah, which land their freight at Glasgow and Liverpool, and from thence it is transshipped by coasting steamers to Londonderry. This is especially the case with flour, machinery, tools, and agricultural implements, which come from the North Atlantic States. Occasionally large cargoes of flour in sailing vessels arrive at Londonderry from San Francisco, Cal., and Astoria, Oregon, and often consist of 30,000 to 40,000 bags, while smaller consignments are taken by steamers to larger ports and reshipped. There is also a large quantity of pine timber brought from Savannah in sailing vessels, the cargo being often supplemented by quantities of tube oak, which is used for making staves. Petroleum designed for the northwest of Ireland is also brought to the port of Londonderry, several merchants being there who import half a dozen cargoes during the season. These are generally shipped from New York, and the merchants are generally satisfied with the condition in which the goods arrive.

Goods are landed from vessels at wharves in Londonderry, where there is always plenty of water to allow vessels of any size to lie alongside, which makes discharging comparatively easy.

Boxes well strapped are the best for hardware, tools, or machinery of any kind. Some manufacturers in the United States send their goods in skeleton cases—that is, open, with bars like a cage. This is objectionable, as it exposes the contents to the effects of the weather and climate. In all cases waterproof coverings should be used for every description of manufactured goods. Bags and sacks are most desirable for flour, and barrels for petroleum and other liquids.

GENERAL REMARKS.

Petroleum barrels may be regarded as an import out of which the importer makes a considerable profit. They are never returned to the United States, but are sold in the interior of the country to coopers and others for the purpose of being converted into tubs for the use of farmers. A large sale is also made of flour bags, out of which the importer has a profit; they are in good demand and always salable.

A matter was brought under the observation of the consular agent at Londonderry during his investigations which may be of interest to the Department, that is, the desirability of pushing the sale of roofing slates quarried at points in Pennsylvania. One of the largest building contractors had a cargo, which, he states, for uniformity of dimension, quality, and color (deep-sea green) are superior to any others lates imported. They are entirely free from pyrites and possess an extraordinary toughness. They are most desirable for every description of roofing in exposed positions.

Although there is no duty on coverings of any description, yet there are freight and port charges, and it would therefore be advantageous to make coverings as light as possible consistent with the safety of the goods.

JAMES B. TANEY,
Consul.

BELFAST, *September 8, 1893.*

BRADFORD.

EN ROUTE FROM THE UNITED STATES.

In this inland consular district there are few direct importers of goods from the United States. As a rule, the merchandise wanted is ordered from the London, Liverpool, and Glasgow importers. In such cases the articles do not reach here in original packages. After reaching the seaport, goods that come direct are forwarded by rail, and in some instances there is a change of cars before their arrival, so they are subjected to considerable handling. No goods are exposed to the elements after arriving here, and there are warehouses at all the seaports. No dry goods originating in the United States come to this market.

OUTSIDE PACKAGES.

Groceries.—Under the head of groceries, as used in the local sense, come salted or cured meats, canned meats, canned fruits, canned vegetables, cheese, lard, and butter. Of these productions there are direct importers in Bradford. Cheese in large quantities comes to Bradford from the United States packed in the ordinary boxes used in the domestic trade. The cheese is simply placed in this round box, in which it fits very closely. Though very few cheeses are damaged en route, the boxes often arrive in a disreputable-looking condition that renders the package unattractive. I saw many cheeses bearing the New York State brand which the handlers, somewhere en route, had been compelled to bind with twine and rope in order to keep the battered box around the incased cheese. The dealers declare that Canadian cheese boxes arrive in much better condition, because made of heavier wood. Cheese exporters in the United States can therefore render greater satisfaction to their English customers by using a heavier and better box. Ham, bacon, and sides arrive in good condition in the ordinary boxes, about 500 pounds in the box. There is no inside covering, and the boxes are not required to be waterproof. The meat is simply placed in the boxes, which are nailed up and encircled with hoops of steel or iron. The meat can be seen through the cracks in the boxes. Any complaint concerning this article of provision does not arise from the manner in which it is packed for shipping. Meat in tins and fruits and vegetables in tins are received in boxes made from hard-wood boards about half an inch think. The cans are placed in these boxes without any other protection. Occasionally a box is battered, and the tins inside show depressions or dents arising from bumps and bangs. They are seldom injured beyond this, and when they are damaged so as to be made unsalable the shipper always makes allowance to the extent of the value of the damaged goods. There is little complaint, however, in this regard. Lard and butter come in the ordinary firkins and pails known to the domestic trade, and no complaint is made. It is easily handled in this manner. Soft soap used for washing wool is received in heavy, well-coopered barrels and casks. Grain, flour, sugar, sirup, and petroleum products are purchased from importers and have a second packing.

Iron manufactures.—Machines used for various purposes in connection with manufacturing are shipped with great care in separate pieces, each piece being wrapped, especially if the machinery is delicate, in soft paper or cloth. To prevent rust or damage, machinery of this description should be packed in waterproof packages. American watch works are sold here in large numbers. Each complete set of works is placed in a small tin box, in which it fits snugly. One and one-half gross of these tin boxes containing works are then placed in a wooden box of light construction. These wooden boxes are again packed to the number desired in large, heavy boxes, thus combining three packages in one. Clocks (small) made in the United States are first wrapped in an oiled paper, then packed in cardboard boxes, which, in turn, are placed in wooden boxes. This system of packing watch works and clocks is considered perfect. Shears and cutlery of United States origin arrive in fine condition, but are not imported direct.

Liquids.—Medicines and drugs in liquid form handled by chemists and apothecaries are packed in several different forms, all of which give more or less satisfaction. The most approved method is the one in which compound sirup of hydrophosphites is packed. The bottles are first wrapped in a soft paper, then incased in thick, corrugated brown paper to fit the sides and ends of the bottles. One dozen bottles are then placed upright in separate compartments in a heavy deal box and securely nailed up. This makes a most attractive package and guaranties bottled goods against all the ordinary dangers of transportation. Malt, vinous, and spirituous liquors of American origin are received at second hand from London and Liverpool.

Tobacco.—Tobacco in the natural leaf and the manufactures thereof are received in the ordinary timber boxes and caddies, according to the nature and fineness of the product. Certain varieties in tin or paper boxes are packed in wooden boxes. These are in all instances the same as used in shipping tobacco products from one portion of the United States to another. To guard against all danger in the way of damage to tobacco, the package should be waterproof. In all cases the best material for outside covering of goods arriving in Bradford from the United States direct appears to be wood.

CLAUDE MEEKER,
Consul.

BRADFORD, *August 16, 1893.*

CORK.

EN ROUTE FROM THE UNITED STATES.

Practically none of the dry goods and only a very small proportion of the groceries used in this district are imported from the United States. The principal American articles brought here are flour, bacon, fruit, canned goods, petroleum, certain classes of agricultural machinery and implements, and some ironmongery, particularly woodworking and other tools.

American goods intended for use in the south of Ireland are not, as a rule, shipped directly to this district, but are generally imported by way of either Liverpool or Glasgow, at which places they are reshipped on steamers bound for one or the other of the various ports on the southern coast of Ireland. The charge for delivery from Liverpool or Glasgow to any railway station in Ireland is generally arranged at a through rate, so that American exporters can calculate what will be the cost to send merchandise to this district.

LANDING AND WAREHOUSING.

Upon the arrival of goods coming to this part of Ireland by sea, they are as a rule landed at wharves at the expense of the steamship company bringing them. At all of the principal ports there are good warehouses with abundant storage room, and perishable articles, as well as goods liable to be injured by exposure to the damp, are placed therein or covered with tarpaulin and properly cared for until removed by the consignees, who are allowed free storage for a limited time only.

I am told that the merchants here buy their foreign goods almost exclusively—regardless of the country in which produced—through agents in either Dublin, London, Glasgow, or Liverpool; and in purchasing they stipulate that such goods are to be delivered in this district in good condition.

EN ROUTE TO THE INTERIOR.

There being railway communication between all parts of Ireland, no pack horses are used. Foreign merchandise intended for the interior of the country is, I understand, forwarded direct from the steamer on which it arrives—either by floating craft or by cart, as the case may be—to a railway station for conveyance to its final destination.

LUCIEN J. WALKER,
Consul.

CORK, *September 18, 1893.*

GLASGOW.

EN ROUTE FROM THE UNITED STATES.

The principal American ports from which goods for Glasgow are shipped are New York, Boston, Philadelphia, and Baltimore, in the order named. Some goods from the Western States come by way of Montreal.

Nearly all the exports from the United States to Glasgow and vicinity come by the boats of three steamship lines—the Allan, Anchor, and Donaldson, in the order named. They are never disturbed or meddled with after shipment until landed, except in case of accident to the ship. The cargo, however, is daily inspected on the voyage to guard against its damage en route.

UNLOADING AND LANDING.

On arrival the goods are landed at wharves in the city of Glasgow upon the banks of the Clyde. All the lines have spacious sheds, inclosed and covered, and the goods are not injuriously exposed to the elements. Occasionally a large vessel, like the *City of Rome* of the Anchor line, is unable to come up the Clyde, and the cargo is discharged at Greenock, at the mouth of the river. The goods destined for Glasgow are generally transferred to a lighter and brought up to Glasgow and there unloaded at the wharves. Goods going to other points are landed at the wharf at Greenock, placed in sheds or warehouses, and thence shipped by rail.

EN ROUTE TO THE INTERIOR.

Goods shipped to the interior are sent by rail, being carted from the sheds to the railroad stations, the steamship companies forwarding them. The goods while in the sheds and warehouses are well guarded, and are seldom, if ever, lost, destroyed, or damaged.

DUTIES ON PACKAGES.

There are no duties to speak of upon any goods exported from the United States, except wines and liquors, tobacco and cigars. Only a small quantity of wines and liquors is received here, though there is a considerable amount of tobacco imported from the United States. It generally comes in hogsheads, tierces, and wooden cases.

The duty on wine, spirits, and ale or beer is upon the gallon, and the bottle, barrel, or package is not considered in the levying of duties. Tobacco duty is levied by the pound, but the hogshead or case in which it is packed is not dutiable.

The other dutiable articles and the duties charged thereon are as follows:

Articles.	Duties.			
	£	s.	d.	
Cocoa or chocolate......per pound...	0	0	1	$0.02
Cocoa or chocolate, ground or manufactured......do......	0	0	2	.04
Fruit (dried currants, figs, fig cakes, plums, not preserved in sugar, prunes, and raisins)......per cwt...	0	7	0	1.68
Tea......per pound...	0	0	4	.08
Preparations containing spirits in bottles, not tested for strength......per gallon...	0	14	0	3.39
Perfumed spirits and cologne water......do......	0	16	6	4.00
Chloroform......per pound...	0	3	0	.73
Chloral hydrate......do......	0	1	3	.30
Collodion......per gallon...	1	4	0	5.83
Ether, sulphuric......do......	1	5	8	6.23
Ethyl, iodide of......	0	13	0	3.16
Naphtha, purified so as to be potable......per proof gallon...	0	10	4	2.51
Soap, transparent, in the manufacture of which spirits have been used......per pound...	0	0	3	.06
Varnish, containing alcohol......	0	14	0	3.40
Playing cards......per dozen packs...	0	3	9	.91

The package used has no effect upon the amount of customs duties.

OUTSIDE PACKAGES.

Upon consulting leading merchants and shippers, I find some diversity of opinion in regard to the best modes of packing. Each has his own way of packing, which has been commended by his experience. I consulted leading exporters, as well as importers, in Glasgow, and from a consensus of their opinions, as well as those of shippers and freighters of the steamship lines and my own observations, I submit the following:

Dry goods.—Should be packed in bales or boxes, according to the nature of the goods. Cheap dry goods and coarse fabrics may well be packed in bales, wrapped securely in paper, with burlaps without, and secured at the ends by boards shaped to the size of the bale and bound by iron and rope bands from end to end. Fine-quality goods should be packed in wooden cases, not to exceed one space ton (40 cubic feet) and smaller, according to weight of goods. Thick packing paper should surround the goods and some waterproof material without, to protect from dampness or any water that may possibly find its way to the hold of the ship. Great precaution should be taken in packing fancy silks, ribbons, etc., as spots or stains occur because of accumulated dampness, if not provided with waterproof coating. In packing dry goods a patent packing paper is much used by the exporters here. It consists of thick, brown paper cemented with coarse cotton cloth by a gum-like material, making the paper practically impervious to water. In fine silks, etc., an additional waterproof is used on the outside of the case or box. Cheap cottons and coarse fabrics are compressed in bales and stoutly bound, the main object being to make a bale that can be easily handled. The wooden box or case is considered by importers here the best covering for dry goods or any articles that can be conveniently and safely packed therein. These boxes or cases, to insure strength and prevent openings at the side where nailed together, should be bound on the corners by nailing a strip of band iron about a foot in length to the corners of the box, so that 6 inches of the band will be attached to each side of each corner at top, bottom, and midway of. the boxes.

Groceries.—Under this head I include all kinds of provisions, of which there is a very large importation from the United States to this port. There is no duty upon apples. Fault is found with the dried apples, those coming from California especially, that they are not properly cured, are irregular in color and only grade as a second quality. They should be packed in deep, strong, wooden boxes, each box containing 50 pounds of the fruit. Raisins should be shipped in boxes of 22 pounds each. The best months for sale here are October and December. Prunes should come in boxes of 28 pounds. California prunes are said by the dealers here not to be so well cured as those coming from France, and therefore do not sell as well. Leaf tobacco is imported in hogsheads and tierces of about 1,000 and 600 pounds, respectively. No covering is used or needed other than the hogshead or tierce. The manufactured product is and should be packed in wooden boxes or cases in which the packages for retail are stored. Flour is imported in large quantities from the United States in cotton and jute bags or sacks of 140 and 280 pounds. The jute bag is generally used for spring wheat and the cotton bag for winter wheat flour. Jute bags are considered the best. Much fault is found by importers here with cotton bagging because of the poor and light quality of the cloth, it being liable to tear in the handling. They think that a heavier cotton bagging would be more economical than jute, but jute is preferable to the quality of cotton sacks now in use. It is suggested by some flour dealers that if flour bags could be loaded and unloaded into and out of ships by the use of large canvas slings instead of rope, fewer cases of damage to sacks and flour would result. It sometimes happens that the shipping companies, in storing the cargo, permit an odoriferous or oily product to be kept in proximity to the flour, thereby contaminating the latter with an unpleasant flavor, which injures it for sale or use. This matter, however, can not be remedied by the shippers except by appeal to the shipping companies. Starch is generally packed in double sacks of 280 pounds, with jute sack within and cotton sacks without. This packing is satisfactory to the merchants here. At present very little sugar is imported from the United States. That which is imported is grape sugar. It comes in sacks or bags, which are satisfactory. Butter is mostly shipped in tubs of 50 and 56 pounds. Tubs in sizes holding these amounts are desirable because of the facility with which they are sold to retail dealers. The tub is the common firkin universally used in the United States for the shipment of butter. Hams, bacon, and shoulders are packed in wooden boxes containing 500 pounds each. They are packed green and covered with salt or borax. These are cured and trimmed here and then sold to retail dealers. Salt pork and beef come in barrels and tierces and sometimes in boxes. Cheese is universally packed and shipped in cylindrical boxes, with cover tacked on. Cheese comes to this port from the United States, Canada, and New Zealand. About one-third of the quantity shipped from Canada and all from New Zealand is covered entirely with cheese cloth, which, when saturated with the oil from the cheese, becomes an air-tight and waterproof material, and therefore a protection. Cheese thus prepared, when divested of this cloth coating, is bright and clean, and, if no better in quality, presents a more marketable appearance. Cheese from the United States is usually shipped with the top and the bottom of the cheese covered with a thin, circular board of the size and form of the cheese, the cloth only covering the sides of the cheese, with a rim about half an inch wide over top and bottom. Cheese shipped in this way often acquires a mold on top and bottom next to the wood, which, although it does not penetrate the cheese, is an accretion which must be removed before sale to retail merchants. This removal, generally done by scraping, hurts the looks and the sale of the article. The cheese boxes are often found, on their arrival at the warehouse of the consignee, more or less broken, which is probably due to the rough handling of the shipping companies. As there is probably no remedy for this, it would seem desirable that extra precautions should be taken in fitting the box to the cheese, and that pains should be taken to attach the covers strongly and firmly. It is suggested by importers that if the American shippers would cover the whole cheese with cloth, their commodity would bring a higher price and have a more ready sale. Lard is best shipped in tierces and pails, the tierces having the usual 300 pounds and pails 28 pounds. These are securely hooped and covered. The common practice of American shippers in packing lard seems to be all that consignees desire. Canned meats, the cans varying in size according to demand, should be packed in wooden boxes sufficiently strong to withstand handling. These boxes, if not large, do not require the iron-strap binding. Candies, baking powder, and other manufactured preparations in the grocery line, are and should be packed in wooden boxes. The packages or cans, as manufactured, being laid in and securely packed so that they will not move in the boxes. In fact, the importers here generally prefer the wooden boxes for the articles that can be well and securely placed in them. Most groceries are transported best in boxes and handled more easily than in barrels or kegs.

Liquids.—All oils are best transported in barrels. Fluids in bottles may be packed in one of two ways. An extensive exporter of wines and liquors of this city gave me two processes of packing liquids in bottles: (1) Each bottle is fitted into a straw case manufactured for the purpose, about half an inch in thickness and of same length as bottle, and the bottles, thus fitted, are laid side by side in wooden cases, without other packing, a dozen bottles to the case; (2) cases, two sides of which are fitted with a dozen grooves half an inch deep and of same size respectively as the neck and base of the bottles, furnish a firm position for the bottles when the box is nailed together, no straw being used. In this gentleman's opinion this process, although in greater or less use for several years, will never be common, as it requires too much labor in packing and putting the boxes together.

Iron manufactures.—Most machinery composed of iron and wood comes to this port packed in crates as different in structure as the machinery is in shape and weight. No suggestions have been made by the importers here, all uniting in the opinion that no one knows as well as the shipper the best manner of packing the various articles of machinery. The one desirable feature is that the crate be of sufficient strength to withstand the necessary handling.

Hardware.—The packing of hardware also varies according to its nature. Small articles should be placed in pasteboard boxes and packed in wooden cases, a convenient number of the smaller boxes in each case. Coarser and heavier hardware should be packed in wooden cases varying in size to suit the articles, but not above the weight of 500 or 600 pounds; over that weight they are awkward to handle. Cutlery and polished hardware of all kinds should be packed first in pasteboard boxes and then in a larger wooden box or case, a number of dozens in a box. Each article should be wrapped in paper, and a waterproof coating should be used to prevent water or air from tarnishing the goods. Fine grades of cutlery are often sealed in tin to completely exclude air and water. This is to be recommended.

Wooden ware.—This can either be packed in crates or boxes, large pieces in crates in such a manner that no part of the piece is liable to be marred or jammed in handling. The usual method of shipping wooden ware from the United States on the lines above indicated is satisfactory to the importers here and approved by them. Small pieces of little value and rough in structure can be shipped in bales bound by strong twine or in bundles. Pails, tubs, washboards, etc., are bound in crates, and, being light, no expensive materials need be used in the crating. Furniture is generally, and always should be, if of any great value, securely wrapped in burlaps, so as to prevent any wear or other bruise from friction or handling.

Glass.—These articles, of course, must be securely packed in straw or some other material to prevent breakage and should be labeled "Glass."

During the last three months there have been received at this port from the United States agricultural machinery, pumps and pumping machinery, organs, and clocks, packed in wooden cases. Files, small castings, razor strops, glass tumblers, wrenches, and other small tools and articles have also been recently imported from the United States, all coming in wooden cases without hurt or damage.

LANDING CHARGES.

The wharves at this port are under the control of the Clyde Navigation Trust, a branch of the municipal government, and the landing charges are

1*s.* 3*d.* (30 cents) per space ton of 40 cubic feet, and the Clyde dues are 2*s.* (48 cents) per ton. This makes a total fee of 3*s.* 3*d.* (79 cents) per space ton, which must be paid before goods are delivered to consignee.

ALLEN B. MORSE,
Consul.

GLASGOW, *September 19, 1893.*

HUDDERSFIELD.

The quantity of American goods received from first hands in the Huddersfield consular district is very small. There are no wholesale houses dealing in American goods. As is the case in most inland manufacturing districts of Great Britain, outside of the wholesale and exporting houses in which the products of the locality are handled, business is conducted generally by small shopkeepers. These shopkeepers usually obtain their supplies of American goods from merchants in London and Liverpool. I have made inquiries among them, and, without exception, they informed me that such American goods as they handled came to them packed in a manner entirely satisfactory and that they could suggest no improvements.

American flour and meats are sold to a considerable extent in this district, and many of the grocers sell American canned (tinned) fruits, vegetables, and meats. Those who deal in these articles suggest no change in the present system of packing.

FRANK C. McGHEE,
Consul.

HUDDERSFIELD, *September 13, 1893.*

LEITH.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district by steamers to Leith, but principally by steamers to Glasgow, and thence by rail to Leith. The only handling at Leith consists in taking the goods on shore and placing them within the covered dock sheds.

LANDING AND WAREHOUSING.

Goods are landed on wharves at the port of Leith, and no lighters are used unless goods are transported to a neighboring port in the Firth of Forth.

There are sheds along the wharves, into which all goods likely to be damaged by exposure to the elements are put.

EN ROUTE TO THE INTERIOR.

Goods are taken from under the dock sheds and loaded in railway wagons alongside the quay, and such handling is necessary only for loading.

OUTSIDE PACKAGES.

For outside covering, bacon and hams are packed in close-fitting, strong boxes, butter in casks and kegs. Grain comes by steamer and sailer and is put into bags on the decks of the respective vessels before being carried on shore. Flour comes in sacks. Waterproof packages are best. Merchants here express satisfaction with the present method of packing American goods.

WALLACE BRUCE,
Consul.

LEITH, *August 31, 1893.*

LEICESTER.

EN ROUTE FROM THE UNITED STATES.

This district, of which Leicester is the principal town, is situated in the most central portion of England, and goods reach it through London, Liverpool, Hull, Bristol, Glasgow, Edinburgh, and other ports of Great Britain, with all of which it has direct railway communication. After arriving at the port of entry, the only handling to which goods imported from the United States are subjected is in their removal from ship to rail and transit by rail to the merchant here.

In this town and district the leading industries are the manufacture of hosiery, boots and shoes, and elastic fabrics, and it is in the two latter departments only that any considerable imports are made from the United States. The boot and shoe trade by far exceeds any other industry in the use of American produce, namely, tanned leather, hides and skins, sole leather, dressed upper leather (fancy and patent), offal leather, shoemaking machinery, and various shoemaking materials and appliances, such as metal eyelets, tacks, papier-maché buttons, sandpaper, cement, shoe pipings and braidings, shoemakers' inks, etc. In the elastic-fabric business, a considerable quantity of raw rubber, rubber thread, and a material called rubber compound is imported.

In the provisions trade we have some few leading merchants who largely import bacon, hams, lard, cheese, and butter direct.

A considerable manufacture of cigars and tobacco is also carried on in this town, upwards of twenty firms being engaged in the trade who import extensively from the United States and other tobacco-producing countries.

The only other imports, so far as I can learn, consist of confectionery, glucose (used in the manufacture of sweets and confectionery), fruit, pease, grass seeds, flower bulbs, flour, California wine, office furniture, sewing machines, musical instruments (chiefly what are known here as "American organs"), roots and barks for medicinal purposes, turned-wood boxes, mineral fat, and cotton-seed oil.

OUTSIDE PACKAGES.

As regards the mode of packing, the merchants (with but few exceptions) speak in the most favorable terms.

In the boot and shoe trade the skins, according to their descriptions, are packed as follows: The heavier description of hides and skins in bales uncovered, finer dressed skins in suitable boxes or wooden cases, and offal leather in sacks or bags. The heavier parts of the shoemaking machinery are sufficiently packed in suitable crates and scantling, while the more delicate accessories come in wooden boxes.

Rubber goods are packed in canvas-lined cases, and the raw material in boxes and barrels.

Tobacco comes chiefly in casks, but the finer qualities in boxes and cases; cheese, bacon, lard, hams, and similar goods come in wooden boxes.

The following are the only complaints which have come under my notice.

(1) Loss happening through weakness and wear and the tearing of the bags or sacks containing offal leather by the use of hooks in landing and by the cutting of such bags or sacks by the customs officials while examining the imported goods. In the case of one shipment in particular, a manufacturer states that in an order invoiced as 41,402 pounds a loss of 4,555 pounds was suffered from this cause. The same observation applies to flour in sacks.

(2) Respecting shoemaking appliances, may be mentioned the absence of proper waterproof protection to shoe tacks and similar goods, which consequently suffer from exposure to damp. One merchant complains of the practice of forwarding shoemakers' inks put up and sold to him in American gallons, which differ in measure from the corresponding English gallon, the latter being of larger quantity; consequently a loss is entailed in retailing this class of goods.

DUTIES ON PACKAGES.

The almost entire absence of protective duties in this country renders it unnecessary to attempt to answer interrogatory No. 6. The only way in which the importer can possibly be affected is by increased freight consequent upon the substantial nature and weight of the packages in which the various classes of goods are consigned, a matter of such minor importance that, having regard to other counterbalancing advantages to the purchaser, the small extra cost incurred thereby would seem hardly to deserve consideration.

S. S. PARTRIDGE,
Consular Agent.

LEICESTER, *November 20, 1893.*

LIVERPOOL.

EN ROUTE FROM THE UNITED STATES.

Goods reach this port chiefly by steamer, and the handling is various; many complaints are made about the torn condition of cotton wrappings.

LANDING AND WAREHOUSING.

Goods are generally landed on the dock quays or wharves, and occasionally by lighters.

The goods are generally landed under covered sheds, though occasionally, through want of space, bacon and cotton are stowed out in the open until removed by the consignees.

Grain and breadstuffs are landed at wharves, sometimes direct into grain warehouses and sometimes under covered sheds which come within 4 feet of the edge of the wharf. Vessels do not work during rain, so that there is no need for waterproof bags. The bags are then skipped into bulk on the quay, and buyers provide their own sacks, of about double the size of the original bags, into which the grain is busheled, and each sack weighed and taken away on carts to the various railways. If the grain is warehoused direct from the ship, it is skipped into large hoppers and hoisted in bulk to the various floors, where it remains in bulk. Thus, in either case, the bags have accomplished their purpose when the vessel is discharged, and are sold by the consignee to dealers, who proceed to repair them.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior both by rail and coasting vessels, entailing cartage in each case, and, although involving several handlings, packages are generally in good order. They are sometimes placed in railway trucks at the docks or warehouses adjacent thereto (grain for instance), but more generally they are carted to warehouses and afterward distributed by rail, or they are carted to the railway termini, where the railway companies have sheds and provide coverings for damageable goods.

OUTSIDE PACKAGES.

As a result of numerous inquiries by correspondence and verbally from the principal firms receiving goods here, I find that, with the exception of raw cotton, they are well satisfied with the condition and mode of packing of the various kinds of goods arriving at this port from the United States.

The principal articles imported are grain, flour, oil cake, cotton, leather, apples, oysters, tobacco, provisions, and oils. Occasionally a shipment may arrive with the packages, or part of them, in a damaged or insecure condition, but a representation made to the shipper secures an adjustment in subsequent shipments. As a rule, experience teaches that it is quite safe to leave the form of package to the American shippers and the receivers here.

A suggestion is made by the secretary of the chamber of commerce that, on account of the damp climate, perishable goods should be packed in waterproof packages; but this suggestion has not been repeated by any of the trade representatives.

The outside coverings, which vary according to the nature of the goods and the places from which they are shipped, are considered satisfactory; but, from inquiries of the various steamship companies, I learn that glucose, dross, and other heavy goods are sometimes shipped in too frail bags, casks, etc.

The representatives of the provision trade complain that, although the goods arrive in good condition, the packages are sometimes much damaged in discharging from the steamers; but it does not appear whether this is owing to the insufficient strength of the packages or the rough handling of them in the process of discharging.

Petroleum.—The greater quantity of petroleum coming to this port from the United States is now brought in bulk. There is, however, still a certain quantity brought in barrels, which is also the case with the great bulk of the lubricating oils, the product of petroleum. The barrels in which the oils come are very good, and the oils are sent in the same barrels into the interior loaded on railroad cars.

Grain and breadstuffs.—The grain and breadstuffs imported at this port from the United States consist almost entirely of wheat, maize, oats, and flour. There is also imported a little barley, rye, and meal. It is now rare for any grain to come from Atlantic ports in bags, or for flour to come in barrels. Therefore, outside of bulk grain, only American flour, oatmeal, and hominy, and such wheat and barley as come from the Pacific coast have to be considered. These two last mentioned are exported annually to the amount of over 1,000,000 tons entirely in jute bags holding about 130 pounds each and strong enough to stand one voyage and sometimes two voyages without injury. The grain is put into these bags in the fields, and thence conveyed by cart, railway truck, or barge to the ocean vessel, where the stowing is done by hand, the use of hooks and knives being strictly forbidden. When discharging in Liverpool small hooks are used by the stevedores to pull the bags to the sling at the hatchway and again to pull the sling of five bags to the side of the hatchway. These hooks make small holes in the bags whereby a few grains escape, but they greatly facilitate operations. The present style of bag is considered fairly serviceable. A more expensive one would become a tax on the original seller, which he is unwilling to incur. Flour is packed in cotton bags of 98 or 140 pounds weight. If larger quantities are packed—196, 240, or 280 pounds—jute bags are used. As a large quantity of the flour is sent forward at the miller's risk, it is his interest to see that the bags are strong enough to contain the flour without breaking. When bags of flour are carted away from the Liverpool quays, the carter is bound to supply tarpaulin coverings in case of rain. The bulk of the flour is stored in private stores, not immediately at the quay side. Hooks are not allowed to be used, the handling being done by slings of canvas and rope.

Few complaints are heard as to the quality of the bags, which are strong enough to stand one voyage. In case of complaint of faulty bags, however, claim is made on the shipper. They are not used a second time for this purpose, but, as flour often remains in store here for several months, that is an additional reason why they should be strongly made. Oatmeal comes in strong, jute bags containing 240 pounds, and is subject to the same handling as California grain. The experience of several years shows that the best package for all these things—wheat, flour, and meal—is a bag or sack.

Cotton.—Cotton is shipped to this district chiefly from the southern ports of the United States, and the bales are very often in a rough condition, because the coarse canvas covers are insufficient in weight and strength to stand the usage to which the bales are subjected en route. Bales of cotton are patched and mended in Liverpool and sent forward to consumers by rail or canal. The best material for outside covering is heavy, strong canvas, and the bales should be bound by ten iron bands instead of by seven, as at present. The practice of double compressing bales should be stopped, as it is found to be injurious to the fiber of the cotton and to the condition of the bale containing it by the time it reaches its destination.* The most important matter that requires the attention of shippers in the United States is the manner of loading nonliner steamers at some of the southern ports, where it is the practice to screw the bales into the vessel and to cut off their ends to make them fit into the hold. A great deal of cotton is lost from the bales owing to the tearing of the canvas in the process of screwing, and as the ship unloads this loose cotton falls about the hold and the quays and is more or less damaged by being trampled upon and mixed with the dust and dirt on the floors. It is never fit to be put back into the bales, and consequently has to be sold at a greatly depreciated value. Much of it is never recovered at all, being swept up with the rubbish on the quay and disposed of by the shipowner or dock authorities, who are bound to keep the ground clear of such inflammable material. In this connection, the following examples of rough and broken cargoes on the vessels named, as extracted from the quay inspectors' returns, may prove interesting and useful:

Tropea.—New Orleans; very rough, a number of bales almost in bulk; about 22,400 pounds of loose cotton. One consignee had to receive 4,480 pounds of cotton to make up his broken bales.

Atlantic.—Galveston; 1,344 pounds of loose cotton warehoused by the shipowners on account of whom it might concern to make up broken bales among "no mark" cotton.

Pallas.—New Orleans; loose cotton, 2,700 pounds (5 bales).

Ida.—Galveston; many bales with ends cut off; loose, 2,592 pounds (5 bales); same ship next voyage, 1,600 pounds of loose cotton.

Aeon.—Galveston; loose, 3,127 pounds (about 7 bales).

Fairmead.—Galveston; loose, 3,780 pounds (about 8 bales).

Inchmarlo.—Savannah; loose, 2,640 pounds (about 5 bales).

Lady Armstrong.—Savannah; loose, 2,408 pounds (about 5 bales).

Ramon de Larrinaga.—New Orleans; some bales in pieces.

Rita.—Galveston; many bales with ends cut off and a large quantity of loose cotton landed; loose, 2,280 pounds (4½ bales), which does not include unknown quantity given to make up broken bales.

Nearly every vessel from the southern ports of the United States lands a quantity of loose cotton equal to from 1 to 8 bales of cotton, which does not include quantities given to make up broken bales. Considerable loss is caused by this last item, owing to the custom of master porters of giving much more than is due in weight to compensate for loss in breakage and quality. There are cases where the masters or mates of vessels give quantities of loose cotton from the hold in payment for certain services rendered to the ship. This state of things often results in heavy claims for loss in weight, which falls upon the American shipper, who, according to the custom of the trade, has guarantied the weight shipped and invoiced. In conclusion, the suggestions with reference to cotton are: The use of better canvas and more bands in making up a bale, the abolition of double pressing, the prohibition of screwing cotton into a vessel, the prohibition of cutting ends off bales to make them fit ships' holds, and the adoption of a uniform size of bale throughout the cotton States, which would do much to insure better and more careful stowing on board ship.

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* But see p. 141.

JAMES E. NEAL,
Consul.

LIVERPOOL, *October 18, 1893.*

SHEFFIELD.

EN ROUTE FROM THE UNITED STATES.

The greater quantity of American goods received in this district are not imported directly, but are obtained through brokers and importing houses, chiefly in Liverpool and London, who supply the local dealers in quantities convenient to their trade. About the only goods directly imported into Sheffield from the United States are canned fruits and meats, hams and bacon, cheese, lard, lubricating and illuminating oils, joiner's tools, and a few other articles of hardware.

LANDING AND WAREHOUSING.

The railway companies have good stations, but importations are usually, and without delay, transferred to drays and delivered to consignees, who store in their own warehouses. Shipments are sometimes made through Hull and via the Goole Canal.

OUTSIDE PACKAGES.

Dry goods.—This class of goods is not imported. They are obtained from Manchester and Glasgow houses.

Groceries.—Tomatoes are put up in 2-pound tins, 2 dozen of which are packed in one-fourth-inch wooden cases 19½ by 13¾ by 10½ inches. Apples are put up in 2-pound tins, 2 dozen tins in one-fourth-inch wooden cases 19 by 17½ by 11 inches. Apricôts come in 2-pound tins, 2 dozen tins in one-fourth-inch wooden cases 18 by 13 by 11 inches. Each tin is labeled. It is suggested that it would be more economical in freight and shipping expenses if 3 dozen tins were packed in a case. Apricot pulp comes in 3-gallon tin boxes. Two tin boxes are packed in one wooden case. Roast beef is put up in 2-pound tins, 3 dozen tins being packed in half-inch wooden cases 28 by 15 by 10 inches, with one-inch double battens on each end. These packing cases are particularly liked and are considered suitable both for local and transit requirements. Corned beef is put up in various sized tins, the most desirable sizes being known in the trade as Nos. 2 and 6. Size No. 2 contains 2 pounds, 2 dozen of which are packed in wooden cases 18½ by 10 by 11 inches; size No. 6 contains 6 pounds, 1 dozen tins of which are packed in wooden cases 25 by 12½ by 10¾ inches. The cases have one-inch double battens on each end. Tongue is put up in tins of various sizes, the most desirable being sizes known in the trade as 1½ and 2½. Size 1½ contains 1½ pounds, 2 dozen tins being packed in one-inch wooden cases 22½ by 12 by 9 inches; size 2½ contains 2½ pounds, 2 dozen tins being packed in one-inch wooden cases 27 by 14 by 10 inches. Salmon is put up in one-pound tall tins, 4 dozen tins in half-inch wooden cases 20 by 13 by 10 inches; steaks in one-pound flat tins, 4 dozen tins in half-inch wooden cases 18 by 13 by 11 inches, and in half-pound flat tins, 8 dozen of which are packed in a wooden case of same dimensions. There is a growing prejudice in this district against tinned acid fruits. It is suggested that acid fruits could be put up in glassware, such as bottles and jars, at little or no greater cost than the present mode of packing, and that the public demand would be greater. Oranges, after being wrapped singly in tissue paper, are inclosed in wooden boxes (crates), 200 in a box. The box measures 26 by 12 by 13 inches, and is made of thin, springy wood. Spaces of about half an inch are left between the lengths of wood for ventilation, and a partition is placed across the middle to consolidate the fruit, as well as strengthen the box. Hams are put up in borax or salt and packed in one-half or three-fourth-inch wooden cases. The sizes of cases vary slightly, but 682 pounds may be taken as the average capacity and 35 by 33 by 22 inches as the measurement. The cases are well nailed and hooped with wooden binders. Bacon is put up and packed in the same manner as hams; the cases vary, but 536 pounds may be taken as the average capacity and 36 by 28 by 25 inches as the measurement. This mode of packing gives satisfaction. Cheese is packed in small wooden boxes made to fit the cheese. Dealers here differ somewhat in their opinions as to the best manner of packing. Some prefer the cheese packed in single boxes, while others think the New Zealand method the best, which is to put up two cheeses in a wooden case having a solid top and bottom and dodecahedral sides, leaving a space of about one-fourth of an inch between each side at the angles. The case has a solid partition across the middle to separate the cheeses. Case measurement depends upon the size of the cheese. Lard is put up in 28-pound wooden buckets lined with parchment paper, with tops, and hooped with iron bands. The bucket should be waterproof. This method is considered the best and most desirable for counter trade. Lard is also put up in barrels of 112 pounds each, which are hooped with wooden bands. Barrels should be waterproof.

Liquids.—The only liquids imported directly into this district are lubricating and illuminating oils and varnishes. The liquids come chiefly in 40-gallon barrels made of American oak or similar material. The barrels are well hooped and meet the requirements of local trade and of transit. There is, moreover, a distinct advantage to the importer in the use of these barrels, as there is a market for them among steel manufacturers here, who use them as casks for packing goods for export to the United States, where the barrels are allowed entry free of duty. When oil is shipped in tank steamers, it is pumped into barrels at the port and forwarded to the interior by rail or canal in the usual manner.

Hardware.—Tailors' shears and scissors are put up singly in paper bags, then placed in cardboard boxes—shears one pair in a box, scissors six pairs in a box. The paper boxes are packed in ordinary wooden cases, the size of case depending upon order. Saws, hand tools, safety razors, and ironmongery generally are, before packing in case, put up in paper boxes. Where the hardware will not allow of this, it is wrapped in heavy paper and then securely packed. Cases made of hard and strong wood are preferred to casks for the packing of this class of goods. The cases need not necessarily be tin lined, though these are preferred for polished goods. It is desirable that the cases be well hooped. Oilstones are best packed in wooden cases, each stone being wrapped with tissue paper. Tool handles are packed without wrappings in wooden cases.

The above methods of packing give general satisfaction, and the only suggestions other than those above stated are that cases be made as strong as possible and that greater care be taken that goods are not damaged in nailing up.

BEN. R. BEDLE,
Consul.

SHEFFIELD, *September 5, 1893.*

SWANSEA.

EN ROUTE FROM THE UNITED STATES.

There are now four lines of steamships making regular semiweekly, weekly, fortnightly, or monthly trips between Swansea and the United States, affording opportunities for shipment from New York, Philadelphia, and Baltimore at all times. Besides these regular liners of the Atlantic Transport, Manhanset, Bristol City, and North Atlantic Trident lines, many "tramp" steamers come to this port with cargo and for coal. Formerly, when shipments to Swansea were made by the vessels of these lines, the goods were discharged at Avonmouth, London, or elsewhere and forwarded to Swansea by rail. Now all four of the lines named bring freight to Swansea without transshipment, thus considerably reducing the rates to this district.

LANDING AND WAREHOUSING.

Goods shipped by water to this port are, with the single exception, I think, of copper ingots, discharged at wharves into iron sheds or directly into railway cars on the quays. Hydraulic cranes of the most modern type are used for discharging at the wharves. Copper ingots are discharged into tenders by means of the ships' derricks.

Though there are no grain elevators in Swansea, there seems to be no weighty reason why grain should not be shipped to this port in bulk.

Minerals, zinc ore, zinc ashes, iron ore, etc., are shipped to Swansea in casks of the cheapest description consistent with strength.

EN ROUTE TO THE INTERIOR.

Goods destined for the interior are forwarded by rail over the Great Western, London and Northwestern, or Midland systems. It should be remembered that the capacity of English and Welsh railway cars averages but about 7 tons (English). Although demurrage may be claimed by the railway companies for the time their cars are under load after twenty-four hours' grace, the claims are not often insisted upon. The facilities for quick transshipment, as well as for warehousing merchandise at wharves at this port, are, in the fullest sense, modern and perfect.

OUTSIDE PACKAGES.

Dry goods.—These should be shipped in wooden boxes of the ordinary kind and size used for domestic transportation in the United States.

Groceries.—This class of goods should be packed in barrels or cases of ordinary strength and capacity. Dried raisins, currants, and coffee should be shipped in boxes or bags on which are marked the net weight of the contents and the weight of the package, as such goods are dutiable by net weight. Tinned goods should be packed in wooden boxes in such a way as to prevent injury by the ordinary usages of transportation. Flour is shipped to this district from the United States in the ordinary sacks and barrels used for domestic shipment in the United States. Some complaint is made that the thin cloth sacks used by some shippers are not sufficiently strong to withstand the somewhat rough handling incident to unloading from vessels, and it is suggested that strong paper bags would be less easily injured than inferior cloth bags.

Liquids.—These may be shipped in casks of any size, or in carboys cased in wood, or in bottles packed with the usual precautions against breakage.

Iron manufactures.—Heavy iron manufactures of a kind not easily injured may be shipped without any covering, being painted or greased to prevent rusting. Iron safes should be protected from scratches by coarse cloth and hay, and the wheels protected from breakage by strong frames. Stoves need only be protected by wooden frames from the weight of other freight stowed with them in the vessel's hold.

Hardware.—Goods of a light description may be packed in boxes in such a manner as to prevent injury by rolling. Agricultural machinery should be partly taken apart and inclosed in wooden frames, and parts especially liable to injury should be protected by coarse sacking and hay or straw.

Generally speaking, it may be said that goods should be so packed as to occupy the least space possible, for the reason that ocean freights are charged at a rate per ton of 40 cubic feet. In case of large shipments, a special rate for any particular kind of merchandise can usually be obtained.

Complaint is made that the casks used for the shipment of iron ore from the United States to this port are not of proper strength, and it is suggested that stronger casks be used.

ARTHUR SPERRY,
Vice and Deputy Commercial Agent.

SWANSEA, *August 23, 1893.*

TUNSTALL.

EN ROUTE FROM THE UNITED STATES.

After consultation with different dealers in American goods I learn that no goods are received directly from the United States, but are purchased from the importers of London and Liverpool, and that but few kinds are brought into this district in the original package, the small quantity received being usually repacked by the importer. My inquiries have covered all classes of goods.

OUTSIDE PACKAGES.

Groceries.—The following articles comprise all goods from the United States under this head:

Cheese is received in the original package, and is entirely satisfactory.

Canned fruit is put up in quart cans, these being packed in boxes. Complaint is made that sometimes these boxes are opened en route and from one to three cans extracted. One dealer said:

> The boxes are fastened with ordinary nails, and can therefore be easily opened. If a narrow sheet-iron band were nailed around the box at each end it would insure greater security to the contents.

Hams and bacon are received only through the larger dealers.

Liquids.—Petroleum, benzoline, and gasoline are purchased from the importers. Petroleum is delivered in the original cask as received from the United States, while benzoline and gasoline are imported in tin cans of the capacity of 4 gallons each. Both methods of packing are entirely satisfactory. Other liquids that may be imported from the United States are purchased in such small quantities from the wholesale dealers that the retailers are unable to state where the goods are manufactured.

Iron manufactures.—Farm implements, such as mowers and reapers, cover all the heavy iron goods brought into this district from the United States. As agriculture is but a small industry in North Staffordshire but few of these machines are imported, and these are always furnished and repacked by the large dealers in London and Liverpool.

Hardware.—Inquiries made at the hardware stores show that nearly, if not quite, all American goods under this head are furnished by a London house and are mainly of goods which are imported in bulk and repacked for the small dealers.

This brief report covers all classes of goods from the United States that are handled in this district. The district of Tunstall, distant 50 miles from the nearest seaport town, mainly given to coal-mining and the manufacture of pottery, is not a section that requires heavy importations of foreign goods, and the meager quantity received is, as stated before, repacked by the importers according to the methods that prevail here.

WENDELL C. WARNER,
Consul.

TUNSTALL, *August 31, 1893.*

AFRICA.

EGYPT.

CAIRO.

EN ROUTE FROM THE UNITED STATES.

Favored to a remarkable degree for direct shipments from every European country of importance, it is regrettable that Egypt can not thus avail herself of American products and manufactures, which explains why Great Britain, France, Germany, and Austria enjoy almost a monopoly of Egypt's growing trade. Direct and regular steam communication with the United States would unquestionably secure a ready market in Egypt and other Mediterranean countries for many articles the outcome of American soil and manufacturing genius.

The route most used at present for shipments to Egypt is by way of Liverpool, from which port to Alexandria the Cunard, Moss, and Papayanni lines maintain regular services, while from Hull and other English ports the Leyland Company dispatches steamers periodically. From London the important Peninsular and Oriental, Orient, and British India companies weekly send steamers to Alexandria or Port Said, and the Anchor and Clan lines from Glasgow bring freight to Port Said and other Suez Canal stations.

A much-used route for freight from New York is that to Marseilles by the Fabre line, with transshipment to Alexandria by the Messageries Maritimes Company. The North German Lloyd steamers to Genoa connect at that place with the Peninsular and Oriental boats for Alexandria, and in the winter season this company sends several of its best vessels direct to Alexandria. Shippers are hoping that the company will soon feel justified in maintaining regular communication throughout the year between the United States and Egypt.

Almost the only direct shipment from the United States is petroleum in chartered sailing ships, which sometimes pick up a cargo of cotton or rags for the return voyage.

LANDING AND WAREHOUSING.

Goods are usually landed at Alexandria direct from the vessel, but lighters are frequently employed. Alexandria has commodious and modern docking facilities. Vessels passing through the Suez Canal have no fixed rule for landing freight at Port Said, Ismalia, and Suez; but lighters are generally made use of in conveying goods to the customs sheds.

At Alexandria and the canal ports there are well-equipped warehouses, and merchandise is seldom exposed to the elements. It should be borne in mind that rain rarely falls in Egypt, and frost is practically unknown.

EN ROUTE TO THE INTERIOR.

Goods for Cairo and places in the Delta and for important towns in the Nile Valley as far above Cairo as Ghirgeh are carried by the governmental lines of railway and are subject to about the same treatment as in other countries. If shipments are destined for the interior and remote districts in the direction of the Soudan and between the Upper Nile and the Red Sea, where the only transport is by camel caravans, packages should not weigh more than 300 pounds, the size being practically immaterial.

OUTSIDE PACKAGES.

Dry goods should be cased or baled, groceries packed in small boxes with sawdust or rice husks, and liquids protected with great care by sawdust or pulverized cork. Hardware should be packed in strong cases with straw, and iron manufactures and machinery in strong crates or boxes. Petroleum is received both from the United States and Russia in wooden cases, each containing two 2-gallon tins. Whether packages should be made waterproof would depend on the nature of the goods, but tin linings or canvas coverings would afford protection from the atmospheric conditions and dust of an arid and semitropical country.

DUTIES ON PACKAGES.

As Egypt levies a fixed duty of 8 per cent ad valorem on the price of goods at the port of discharge, not only the cost of boxing, but the freight as well, becomes a part of the sum assessable. The Government reserves the privilege of raising the duty on distilled beverages, wines, and luxuries to 16 per cent ad valorem; and also to reduce the duty on articles of prime necessity to 5 per cent, and even to abolish it entirely. The duty on tobacco is 20 piasters ($1) per kilogram (2.205 pounds).

FREDERIC C. PENFIELD,
Agent and Consul-General.

CAIRO, EGYPT, *October 23, 1893.*

MADAGASCAR.

TAMATAVE.

EN ROUTE FROM THE UNITED STATES.

The bulk of merchandise imported into Madagascar from the United States consists of sheetings and shirtings, to the annual value of about $600,000, and petroleum to the annual value of $4,000. The cottons come to Tamatave in sailing vessels direct from Boston or New York in bales of 1,000 yards and are simply baled in sacking and iron hooped. I presume the exporters do not consider it worth their while to wrap the bales in oilcloth, consequently, in the event of any exposure to wet, a certain portion is somewhat damaged. In large importations of the cheap American cottons experience seems to have proven that this system of packing satisfies requirements, but I recommend that goods sent in bales be covered inside the sacking with some waterproof material. The injunction to "use no hooks" is a safe precaution to have printed on the bales, as, in hoisting and lowering bales by cranes, if hooks are carelessly inserted, great damage may be done to the goods. Petroleum is imported here in tins of 5 gallons each and two tins are inclosed in a case.

Goods come by steamer to Madagascar, either via Marseilles, from which port there are two monthly mails to this place, or via Southampton, from which port there is a monthly mail direct to Tamatave, calling at Cape Town and Natal on the way. It may be generally stated that all kinds of goods coming to Madagascar may be packed in a way similar to that used when they are sent to London, except such changes as may be necessary on account of the lengthened voyage. It requires at least six to eight weeks, under the most favorable circumstances, for goods to arrive at Tamatave from an American port. Thus, for instance, there are some articles perishable and some liable to rust, which, though they might be safely sent from New York to a European port in a light case, require for a voyage of two months strong, air-tight, tin-lined cases.

UNLOADING AND LANDING.

The port of Tamatave is a roadstead protected by a line of reefs, through which there are two passes. The largest liners have good anchorage within 600 yards of the beach, and all goods are landed by flat-bottomed lighters rowed by natives. Each lighter carries from 5 to 8 tons, and, as the harbor is very smooth, landing is effected easily and without damage to goods. There are no wharves or jetties. The goods are removed from the lighters by natives and conveyed through the town on a small Decanville railway.

WAREHOUSING.

There are no sheltered warehouses on the shore except what are called custom-house warehouses, in which goods can be placed pending the payment of the 10 per cent ad valorem dues or as long as the merchant may wish for his own convenience. These custom-house warehouses belong to the Malagasy Government, but the importer or consignee has no guaranty against fire, robbery, or any other casualties, such as destruction by hurricanes, which occur periodically. It may be stated, however, that all due precautions are taken and an effective police is set over these warehouses, and but few of these possible casualties have been recorded.

EN ROUTE TO THE INTERIOR.

All goods for the capital (Antananarivo) and the interior are conveyed by "porters," consequently merchandise that will admit of it is unpacked and made into parcels or bundles of 35 to 45 pounds each. Two such bundles are attached to the ends of a bamboo pole about 5 feet long, which is balanced on the shoulder of a man, who thus carries on an average 80 pounds, though some are known to carry as much as 120 pounds. If the article is such that it can not be divided, or the merchant does not wish to break the case, one long pole is attached to it, and two men carry a weight of 120 to 175 pounds. If the article is still heavier (a cooking stove, for example), two long bamboos are attached to the sides, thus forming four shafts, and it is borne on the shoulders of four men. If the article is still heavier, such as a piano, harmonium, or safe, two or three men are allotted to each shaft, so that for conveyance some articles require sixteen men.

Cotton goods which reach here are in pieces of 40 yards, printed calicoes in 24 yards, and the porters take as many pieces as their strength permits, and are paid accordingly. It may be put down generally that the cost of conveying goods to the capital amounts to from $3.50 to $4 per 100 pounds. The men are responsible for keeping the cottons dry on the road. No impermeable packing material need be furnished them, as there is a peculiar leaf called "hofa" (*Pandanus sup*) which, when dry, is wrapped about the parcel and made secure by twine. This is perfectly impervious to water. All piece goods may be sent into the interior in this manner, but valuable stuffs, haberdashery, and millinery should be packed in tin-lined cases to be conveyed to the interior. It must be borne in mind that a case weighing 100 pounds would require two men to carry it while one of 140 pounds would require no more. Seven thousand pounds of goods in seventy cases of 100 pounds would require one hundred and forty men, whereas, if the goods were in fifty cases of 140 pounds, one hundred men could convey them to the interior, showing a difference of forty men or $150 saving in carriage.

Groceries to be conveyed to the interior are divided up, as in the case of cottons, into parcels of 40 pounds or thereabouts and two given to each bearer. Thus wines, spirits, beer, tinned goods, etc., can be conveyed without difficulty or damage, Flour, biscuits, crackers, raisins, currants, and such like goods should be in tins of 40 pounds packed in cases for shipping. The cases, however, are taken off at Tamatave, as it would be useless to pay carriage on them at the rate of $4 per 100 pounds.

Some things from their very nature can not be unpacked—such, for example, as window glass—consequently these must be taken to the interior in the state in which they are shipped. Importers should therefore bear in mind that the weight should always be either 35 to 40 pounds or some multiple of 65, as 130 or 260, etc. Of course, certain articles can not be made to conform to any of these rules. They are nevertheless by some means conveyed. The number of things that have been conveyed to the capital is too varied to quote. Nothing that man is likely to want has failed to reach the interior. One acquainted with the terrible mountain roads between Tamatave and Antananarivo can not but wonder how some things, such as iron safes, requiring one hundred men, and enormous cannons for the Government could have been transported to the capital.

As the only conveyance is by means of porters, all merchants are on the same footing. The prices of commodities are, of course, proportionately increased by the somewhat expensive mode of carriage.

OUTSIDE PACKAGES.

Cotton goods should be packed in bales when of a common quality; if of a better quality, wrapped in oilskin, in addition to the outer covering of sacking, and iron hooped. American drills also come in bales. The common qualities of printed calicoes may come in bales, but superior goods—alpacas, stuffs for ladies' dresses, silks, and cloth for men's clothing—should be wrapped in brown paper, as they are seen in the dry-goods stores at home, and packed in tin-lined cases of 100 to 125 cubic feet, according to shipping convenience, the size of the case being of no consequence as far as landing here is concerned, unless it is the importer's intention that they should be shipped into the interior without unpacking, in which case the remarks under shipment to the interior must be observed.

Nails, gunpowder (when allowed to be imported), Epsom salts, etc., come in kegs; if for the interior, of such weight as will enable a man to carry two kegs.

Salted pork, salted beef, and pickled mackerel, etc., should come in barrels; if for the interior, they should be in small barrels, so that a man can carry two or that two men can carry one of 120 to 140 pounds.

Bottled beer, porter, and other beverages, such as mineral waters, come in barrels containing 6, 8, or more dozens. These are unpacked for conveyance into the interior.

Flour and sugar come in bags, the former at present principally from Australia and Europe, the latter from Mauritius. These are forwarded very often to the interior in sacks, the bearers being responsible for keeping them dry. But I would advise that American flour and sugar, when shipped for consumption at this port, be sent in barrels, and when intended for the interior in tins of 40 pounds each.

Wines (Bordeaux) and spirits (chiefly rum from Mauritius) come in 36-gallon barrels; for shipment to the interior they are filled into demijohns, of which a bearer can carry two. Fine wines and bottled spirits, champagne, lime juice, etc., come in cases of twelve bottles. A man can carry two of these cases into the interior. The cases are not removed, as they are of light, pine wood and are of convenient size and weight for carrying.

Earthenware, crockery, and glassware come in large barrels, packed in straw, the finest goods in sawdust. The size is immaterial as far as this port is concerned, exporters only having to consider their own convenience.

All such things are unpacked and rearranged in 40-pound parcels for transport to the interior.

Ironmongery and hardware are packed in hay or straw and crated. Cooking pots, which constitute a staple article of import, are not packed at all; they are placed in half dozens or tens one inside the other, bound together by strings attached to the handles, and placed thus in the hold of the ship. It need hardly be mentioned that all such articles as are not divisable, such as sewing machines, typewriters, copying presses, and furniture, are usually packed by the manufacturers in the most suitable way for exportation. Only one point must be insisted upon for the first-mentioned articles, viz, that tin-lined cases are indispensable if for shipment into the interior, as the forests through which they pass are invariably very wet.

DUTIES ON PACKAGES.

By treaty regulations the customs charges on all imported goods are 10 per cent ad valorem on the cost price of the goods in the United States—not on the total of the invoice, which includes generally costs of package, commission and insurance, etc.

The kind of package, therefore, does not affect the customs charges, and need only be regulated by such considerations as I have taken into account above for the best handling of the goods and their preservation when shipped into the interior.

JOHN L. WALLER,
Consul.

TAMATAVE, *September 26, 1893.*

MADEIRA.

FUNCHAL.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district from the United States by various routes, the most direct being from Boston and New York, either by steam or sail. Goods sometimes come to the Azores from New York, either by the Insular line of steamers, with headquarters at Lisbon, or the Andersen line, of Oporto. From the Azores they are brought to this port by the steamer *Funchal,* of the Insular line, which plies between Lisbon and the Azores, making the round trip once a month, calling at this port on the outward and homeward voyages.

After January 1, 1894, there will be semimonthly sailings between Lisbon and the Azores, touching as usual at this port on the outward and homeward voyages. This will materially stimulate trade between here and New York.

I have known several orders to be canceled by New York merchants on account of the uncertainty of transshipment at the Azores, merchants feeling uneasy lest goods might be damaged during the delay.

Some goods reach here via Liverpool. Freight from Liverpool costs as much as, if not more than, from New York direct.

LANDING AND WAREHOUSING.

All goods are taken from vessels in lighters. They are stored in the custom-house till examined by the authorities, after which they are taken charge of by the owners.

EN ROUTE TO THE INTERIOR.

As Funchal is the principal trading port of this district and the only one with which foreign business is done, the question of packing goods suitable for pack horses or porters is not applicable. Such goods as are reshipped to the shore villages around the island and to Porto Santo are made up here in packages suitable to the demands of the dealers in those villages. Large amounts are sold through the interior of the island by pack peddlers, who are sent out by the principal houses here. The loads which the peddlers carry are simply marvelous.

DUTIES ON PACKAGES.

To fully illustrate to shippers the cheapest mode of packing the respective qualities of goods for this district (and this will hold good for Portugal and her adjacent possessions), I quote from the tariff laws of 1892. The duties are levied on the kilogram (2.205 pounds).

	Reis.*
Braids and gilt trimmings for army officers' outfits (including tares, excluding, however, boxes made of cardboard, thick paper, or wood)	1,200
Prints, cotton sheetings, plain white cotton goods, and fine white shirtings (tares and boxes included)	400
Linen goods, collars, and cuffs (including tares and boxes in which they are packed)	1,600
Ribbons and trimmings (including tares and boxes)	1,000
Woolen trimmings for ladies' dresses of any quality, pure or mixed (including tares, excepting, however, boxes made of cardboard, thick paper, or wood)	2,500
Linen trimmings of all kinds, pure or mixed (including tares, excepting, however, boxes made of thick paper, cardboard, or wood)	2,500
Toys of all kinds, except gold, silver, or platina (including tares)	2,000
Buttons, not specified, of all qualities used in trimming dresses or suits, except gold, silver, or platina (including tares)	1,200
Visiting cards of any variety, not specified (including tares)	1,000
Liquid gums (including tares)	150
Shoe blacking (including tares)	150
Pills, capsules, ether, and medical extracts (including tares)	2,000
Globules, granules, lentils, etc. (including tares)	5,000
Lozenges of all kinds and quality (including tares)	600
Drugs, simple or compound, not specified (including tares)	600
Perfumeries of all kinds (including tares)	1,000
Gunpowder in cartridges (including cartridges and tares)	500
All kinds of instruments for playing games of any kind, except articles used in billiard or pool playing or their belongings (including tares)	500

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*1,000 reis = 1 milreis = $1.08. The reis is about equivalent to the American mill.

	Reis.
Soap (including tares)	60
Fancy soaps in small cakes (including tares)	300
Tobacco (tares pay 100 reis per kilogram, boxes containing tobacco free):	
Cigars	2,640
Fine cut or any other variety	2,160
Ink (including tares)	100

It will be seen that the charges on boxes and tares vary with the quality of the merchandise. It is safe to say, however, that all outside packages should be made as light as possible consistent with the proper protection of the goods.

Nails generally come here in sacks or bags made of strong, coarse fiber.

JOHN F. HEALY,
Consul.

FUNCHAL, *August 11, 1893.*

MOROCCO.

TANGIER.

EN ROUTE FROM THE UNITED STATES.

The shortest route for shipping goods from the United States to the coast of Morocco is from New York via Gibraltar per Anchor line, German Lloyds, and the Italian line of steamboats; the next best is from the United States via London and Hamburg. Goods meet with the usual care on board the steamships.

LANDING AND WAREHOUSING.

Goods are landed at the ports of Morocco by lighters; there are no wharves.

Suitable warehouses are provided.

EN ROUTE TO THE INTERIOR.

Goods are sent into the interior by camels, mules, and donkeys.

A camel's load consists of 5 cwts. (560 pounds) in two packages, a mule's of 3 cwts. (336 pounds) in two packages, and a donkey's of 1½ cwts. (168 pounds) in two packages. Dimensions of packages are immaterial. The usage to which the goods are subjected en route is not so rough as might be expected under existing circumstances. There is no rain in summer to damage goods sent in this season.

OUTSIDE PACKAGES.

The best material for outside covering for bales is coarse packing cloth, with oilcloth inside, secured by iron hoops. It depends upon the nature of the article to be shipped whether the package should be a bale, box, keg, barrel, or bag.

The most suitable mode of packing is the following: Coal, in bulk; cotton-seed oil, in barrels; crockery, in hampers; china ware, in boxes; deals, loose; dry goods, in bales (except silks, which should be packed in cases); dry hides, in bundles; drugs and groceries, in bags, barrels, or casks, according to their nature; glassware, in casks; hardware, in casks, cases, or kegs; iron beams, loose; ironware, in casks, cases, or kegs; liquids, in barrels (if bottled, in cases); matches, in cases; machinery, in cases or in loose pieces; paper, in bales; petroleum, in cases; provisions, in cases; tea, in chests; woolens, in bales.

DUTIES ON PACKAGES.

Customs duties are charged on all goods entering the ports of Morocco, the nominal rate being 10 per cent ad valorem; most of the importers get off with somewhat less. At the custom-houses all packages are opened and contents either counted or weighed before they are allowed to pass.

F. A. MATHEWS,
Consul-General.

ANGIER, *August 25, 1893.*

MOZAMBIQUE.

EN ROUTE, LANDING, AND WAREHOUSING.

American goods reach this province by a number of routes, the greater part coming from New York to the port of Lorenzo Marquez direct. That port possesses a fine harbor, but has no dock at which a vessel can discharge; consequently the goods have to be slung over the ship's side into a lighter, which, when loaded, is towed ashore to a small pier and discharged. The goods then go into the custom-house, and after examination are carted either to the warehouses or to the freight station. About one-third of the goods landed at Lorenzo Marquez are immediately reshipped as transit goods by rail to the Transvaal. A run of about 140 miles takes them to the present terminus of the line at the foot of the Elands Berg, in the Transvaal; they are then loaded on ox wagons carrying from 50 to 80 cwts. each, and, after a journey of about 175 miles, are finally set down at their destination—Johannesberg or Pretoria.

Merchants in Inhambane receive their American goods from Durban or Lorenzo Marquez by coasting steamers, and immediately after the arrival of a steamer the goods are lightered ashore and taken to the custom-house, and after clearance go into the merchants' warehouses.

American goods going to Beira are either transshipped at Cape ports from the steamers now running from New York to South Africa or at Lorenzo Marquez from sailing vessels to coasting vessels or are taken from stocks in hand in Lorenzo Marquez or Durban. Upon arrival at Beira they are lightered ashore and are immediately warehoused. At Beira goods for the interior are made up by the merchants into packages or loads weighing from 50 to 60 pounds, as they have to be transported by native porters. As the goods are necessarily exposed to the elements, they are covered with some waterproof material.

The same conditions apply at Chinde and Kilimane as at Beira.

At this port (Mozambique) some American goods come by steamer from English or European ports or from Zanzibar, and others come from Bombay by steamer or dhow. All goods are discharged into lighters and are immediately warehoused.

OUTSIDE PACKAGES.

Generally speaking, all goods of American production coming to this coast are well packed.

Dry goods.—The only goods of American production imported that can be classed as dry goods are canvas and cotton piece goods, drills, etc. The bales in which they are packed should always be strapped with iron and their edges protected by strips of wood. All American cotton goods coming here are in bales bound with cord. When these cords are cut and the bagging is ripped open the pieces of cloth all fall out in a heap. Considering that these pieces have to be made up in small bales of from 50 to 60 pounds for interior transportation, it would be a good plan to tie them up with stout cord into bundles or bolts of those weights before baling. The packing of cottons in this manner would be much appreciated, as much time would be saved in the making up of the small bales.

Groceries.—The quantity of American groceries coming to this coast is small; as a general rule, they are well packed. It is advisable to pack all perishable goods in tin-lined cases, and all packages of this sort should be kept under the 60-pound limit, if possible.

Liquids.—The only liquids of American production imported are oils. These are generally well packed, and the cases and tins are well made. Some merchants in ordering oils for the interior trade specify that they shall be packed in wooden cases of one inch instead of half an inch, that they may stand the transport better.

Iron manufactures.—Manufactures of iron, such as agricultural and mining tools and machinery, from their nature, must be packed in heavy, strong cases, in order to stand the hard usage to which they are subjected. I have seen from four to eight native porters staggering along under the weight of a heavy case, which they were carrying between them on their shoulders, suddenly stop and drop it, jumping clear at the same time. Not only the package, but the contents, must be stoutly made to stand such usage. The smaller the case the better.

Hardware.—These goods, also, must be well packed in stout cases. If the goods are light, they may be put in larger cases and will reach their destination without any mishap.

DUTIES ON PACKAGES.

Almost all goods imported into this province are charged specific duties, and duty must be paid on the packages, as well as on the contents, and at the same rate. Liberal tares, however, are allowed, and bales bound with iron straps are allowed double the tare of the same goods roped. Mining and agricultural machinery of all sorts are free; consequently the packages are free of duty.

AMERICAN TRADE.

American merchants who succeed in doing business with firms in this province should pay particular attention to the packing of the goods. It is the practice here for the buyer to specify exactly how he wants his goods packed, and such specifications should be carried out to the letter. Particular attention should also be paid to the loading of goods shipped by sailing vessels. Careless work on the part of the stevedore will undo all the good that careful packing on the part of the shipper has done.

It must be remembered that American trade is very small in this province at present. This is not because there is no opening for American goods here, but because our merchants have not tried this market. The old houses here, many of them branches of European firms, must be visited personally by those wishing to do business with them. They will not go to the United States for merchandise because they are at present well satisfied and naturally think that they can make better purchases in Europe than anywhere else. The business people on this coast know a good thing when they see it, and our merchants and manufacturers have much to offer them that they can handle to good advantage.

W. STANLEY HOLLIS,
Consul.

MOZAMBIQUE, *September 30, 1893.*

NATAL.

DURBAN.

EN ROUTE FROM THE UNITED STATES.

Hitherto goods have reached this port by sailing vessels chiefly from New York. Lately a direct line of steamers has been established, which will in all probability take the bulk of the trade (unless freight rates rise to abnormal heights), and presumably cargo will not be shifted during the voyage.

LANDING AND WAREHOUSING.

Sailing ships arriving here and drawing under 17 feet of water can cross the harbor bar and discharge their cargoes on the wharves. Steamers and vessels drawing over 17 feet of water have to remain at the outside anchorage until their drafts have been reduced by means of lighters. When this is done they are brought in to discharge on the wharves.

Ample warehouse accommodation is provided alongside the wharves. From the warehouse the railway (which is connected) takes goods direct to their destination.

EN ROUTE TO THE INTERIOR.

Goods are chiefly carried by rail direct from the wharves and the only shifting or handling to which they are subjected is from wharf to rail and from rail to ox wagon. In the rainy season, when the roads are in bad condition, the ox wagons are liable to stoppages, and then it is sometimes necessary to unload and reload, subjecting the goods in transit to further, and in some cases to careless, handling. Under such conditions packages should be of a medium size when possible, but, though this is generally desirable, no special limit is essential. The Government of the Transvaal is now in communication with the government of this colony, making arrangements for the extension of the Natal Government railways to Johannesburg and to Pretoria, the capital of the Transvaal. These are the chief markets, and when once the railway reaches there, the handling and carriage by the ox wagon will be reduced to a minimum.

OUTSIDE PACKAGES.

Dry goods, generally speaking, may be packed in bales, with waterproof lining between the goods and outer covering, and in the event of excessive weight the bales should be bound with strong, iron bands. Bales or cases are preferable to casks, because the latter are liable to extreme heat in crossing the line, which causes the staves to loosen, the consequence being that the heads fall in.

Groceries in tins should be packed in ordinary cases; groceries in packets should be packed in waterproof cases.

Liquids in bottles should be packed, with straw coverings, in ordinary cases. Liquids in tins should be packed, with sawdust, in ordinary cases. Liquids in drums or kegs require no packing, but should be sent loose, properly marked.

Iron manufactures generally need only crating.

Hardware generally needs waterproof cases. Such goods as cutlery, etc., should be packed in tin-lined cases.

Kerosene cases should be wholly of three-fourths-inch wood. The half-inch wood cases from the United States are frequently damaged, causing a loss of at least 10 per cent. The one-inch wood cases are too heavy. As the transport rates to the interior are very high, the carriage of these cases is expensive. The lids and bottoms of these cases, instead of being in one piece lengthwise, should be in three pieces crosswise. The upper and lower parts of ends should project three-fourths of an inch, through which nails may be driven into the cover and bottom, making all flush. The nailing of the tops and bottoms crosswise materially strengthens the case. This kind of case is adopted by some of the American refiners, and, if universally used, a large percentage of oil leakage would be obviated, and the cost little, if at all, enhanced.

DUTIES ON PACKAGES.

Customs duties here are charged only on the contents of packages; packages themselves are free. It is therefore of great importance that shippers, when rendering invoices, should state separate values for goods and packages, even when (as is often the case with American goods) the usual market price includes the cost of packages; otherwise, in the absence of any evidence as to cost of packages, the customs officers compel the importer to pay duty on the gross invoice cost.

The general opinion in this town is that American packers require no teaching as to packing, and that there is very little cause to complain.

ACKNOWLEDGMENT.

I am greatly indebted to Mr. Samuel Butcher, the senior member of the firm of Butcher & Sons, and to Mr. H. M. Witherspoon, of the firm of H. & I. McCubbin, both of this place, for most of the information contained in this report.

J. PERROTT PRINCE,
Consular Agent.

DURBAN, *September 27, 1893.*

ST. HELENA.

EN ROUTE FROM THE UNITED STATES.

Two American schooners of nearly 300 tons each usually leave New Bedford, Mass., twice in each year about the months of December and June, bringing here stores for the American whaling fleet cruising in the South Atlantic, and taking back to the United States their catch of oil, etc. These schooners bring at the same time, either on the order of the merchants here or for sale on account of their owners, flour, salt beef, and salt pork in barrels; lard in 100-pound kegs or in cases containing 50 pounds packed in tins of various sizes, but generally 5 or 10-pound tins; paraffin oil in cases of two tins of 5 gallons each; Indian corn and other grain packed either in sacks or in large whale casks, which, after being emptied, are sold to the whalers; meal in sacks; and a variety of general merchandise, consisting of canned provisions, biscuits in barrels or whale casks, cotton goods, starch, soap, boots and shoes, and other articles, either packed in original cases measuring from 2 to 10 cubic feet or stowed promiscuously in large whale casks brought for sale to the whalers. They are not subjected to any rough handling or usage en route.

LANDING AND WAREHOUSING.

All goods brought into St. Helena from abroad are landed from the carrying vessels in lighters at an open-sea wharf.

No warehouses are provided; so that goods left there are exposed for the time to the elements, but are rarely, if ever, known to suffer damage. Occasionally, for a few days during the months from March to December, rollers set in, which prevent the landing of goods, but rarely cause damage. Goods are supposed to be removed from the wharf as soon as landed, and if left there for more than twenty-four hours are subject to pay double wharfage.

EN ROUTE TO THE INTERIOR.

Goods are conveyed from the wharf into the town and interior by horse carts or drays, which usually carry about a ton each.

OUTSIDE PACKAGES.

The best material for outside covering depends entirely on the contents of the packages. Bales, boxes, kegs, barrels, sacks, or bags are the most convenient sized packages. No package need be water-tight unless it contains goods likely to be injured by dampness or water in transit.

THOS. E. FOWLER,
Acting Consul.

ST. HELENA, *October 12, 1893.*

SIERRA LEONE.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district direct by sailing ships and by steam vessels via England.

LANDING AND WAREHOUSING.

They are landed by lighters at wharves and jetties, the ship being moored near by.

Warehouses and sheds are provided by the Imperial Government at nominal charges after five days' storage.

EN ROUTE TO THE INTERIOR.

Goods for the interior traffic are all carried on men's heads and shoulders in parcels weighing from 60 to 100 pounds. Some goods are carried many miles into the interior. Dry goods in bales well hooped and waterproof lined will suit the present mode of conveyance.

OUTSIDE PACKAGES.

Dry goods for the interior trade are not opened or inspected after leaving the custom-house here, unless smuggling is suspected. All bales should be made waterproof.

Groceries, except flour and bread and coarse sugar, should be in pine boxes, which should not exceed 100 pounds net weight when packed. Flour should be in barrels of 196 pounds, in half barrels, and in tin boxes of all sizes up to 100 pounds; sugar in barrels and half barrels, and fine sugars in tin boxes of all sizes up to 100 pounds.

As regards goods for the trade in the colony, the ordinary mode of packing is satisfactory. Tobacco for inland trade should be packed in pine boxes of 100 pounds.

DUTIES ON PACKAGES.

No customs duties are charged on cases; the net contents only are dutiable, with privilege to fill up on account of leakage.

CONCLUSION.

American goods and manufactures are not known in this market to the extent they should be. There is a strong demand springing up here for samples, and some orders have already gone forward, due to samples and advertisements which I have exhibited by request of numerous manufacturers and merchants in the United States.

BOLDING BOWSER,
Consul.

SIERRA LEONE, *August 22, 1893.*

ASIA.

CEYLON.

COLOMBO.

EN ROUTE FROM THE UNITED STATES.

With the exception of kerosene oil, all goods arriving here from the United States come via England either by transshipment at London or Liverpool or out of bond in either of those ports. The handling is sometimes very rough, and the goods often bear evidence of exposure to rain—most likely during transshipment.

LANDING AND WAREHOUSING.

All goods are landed by lighters.

There are warehouses sufficient to contain all the goods imported, except heavy machinery and railway plant; but steamers discharge their cargoes into lighters much faster than the goods can be landed and warehoused; consequently it is not unusual for goods to remain several days in the boats, so effectually covered from the weather with tarpaulins, however, that damage in this respect seldom occurs.

EN ROUTE TO THE INTERIOR.

Goods are sent to the interior either by rail or bullock cart, and the inland transit is as creditably performed here as it is, perhaps, in any other country. No special attention need be paid to size and character of packages, except to provide that they are not overbulky or weak in construction.

OUTSIDE PACKAGES.

Shippers should use packages which to their own knowledge are best suited to their goods, and all perishable articles should be in waterproof packages. Glass and glassware should be packed in casks; also, iron hollow ware. Liquids should be in casks, tanks, or drums.

DUTIES ON PACKAGES.

No duty is leviable on packages the contents of which are merchandise, except in case of gross imposition, such as, for example, the packing of merchandise in real trunks or in some manufactured articles of domestic furniture. Even in this respect a single package would not, as a rule, be regarded as liable to duty; and the practice would pass unnoticed, unless it became systematic.

W. MOREY,
Consul.

COLOMBO, *August 22, 1893.*

CHINA.

AMOY.

The port of Amoy has no wharf of any kind or description. The landing of passengers and goods is effected by sampans and cargo boats. All the vessels are moored in midstream. The sampans are for passenger traffic only, but often they will land small lots of merchandise without being interfered with by the cargo-boats company, who enjoy a monopoly in this trade. The cargo boats can moor alongside the bund at high tide, but when the water is even at its lowest mark it can always be reached by jetties (landing piers) stretching far out into the sea, which renders the landing of goods more difficult.

All the European firms in Amoy possess large and substantially built godowns attached to their individual business offices, and for the storage of kerosene oil special warehouses are built on the most convenient spots in the island of Kulangsoo. There is also a public godown belonging to the imperial Chinese customs situated within the custom-house compound, which affords ample room for the storage of merchandise and opium. Because of the steady increase in quantity of the import of kerosene oil the Amoy Dock Company has caused a new godown to be built at the Ling Tow jetty, in the Island of Kulangsoo, for the accommodation of merchants, and it is so large that it is capable of storing from 80,000 to 100,000 cases of kerosene oil at one time.

Kerosene oil, imported from New York in sailing vessels, is the only American product which reaches Amoy direct. According to the customs quarterly returns, which contain a detailed report on the trade of Amoy, there was nothing imported from the United States. But American goods—tinned provisions, patent medicines, clocks, watches, lamps, tools, cotton piece goods, yarns, threads, and machinery—are seen in every store in the city. The customs authorities do not class these as American imports, because they are always shipped from Hongkong or Shanghai, and are classed as goods imported from these two ports. American manufacturers at home will therefore have to ascertain the particular methods of packing and the exact requirements from their agents or customers at those places which have direct steam communication with New York and the cities on the Pacific coast, for there is no direct line of communication of this kind between Amoy and the United States. The only vessels that clear from Amoy to the United States are tea steamers, and the only vessels that come to Amoy from the United States are sailing ships. These are of great capacity, are laden with kerosene oil, and sail from New York direct for Amoy two or three times a year. This trade has been in the hands of the Americans ever since the Chinese learned its use, and until very recently the Americans monopolized the trade. But the Batoum oil found its way into Amoy two years ago, and the trade has already reached large proportions. As a consequence, the import of American kerosene has declined to such a degree that the quantity of Batoum oil imported during the last quarter was 36,000 gallons more than that of the American. The following statistics for the last few years will substantiate the correctness of this statement:

Product.	1890.	1891.	1892.	1893.
	Gallons.	*Gallons.*	*Gallons.*	*Gallons.*
American	128,700	385,120	531,060	218,920
Russian	(*)	(*)	129,900	255,060

* None.

From the above it is seen that the Russian oil made its first appearance here in 1892, and it would appear as if the American article would soon be entirely driven out of the market unless the American producers and exporters improve their packing and exercise more care and attention in the shipping of the oil. I am told by some of the dealers here that they have repeatedly warned the American producers of the danger to their trade in this line by reason of the Russian article reaching the market in better condition.

The trade in kerosene is an important one, and it will continue to be as long as the Government prohibits the native oil springs from being worked. To the great majority of the people it is an indispensable article. In the interior, as well as in cities and towns along the coast, stores for selling kerosene oil are found in great numbers. Peddlers selling this commodity alone are seen plying their trade from village to village, selling the oil to the farmers and peasants by the ounce and catty (one catty=1⅓ pounds), thereby making a profit of 50 per cent or more—an avocation which was never known to the people until quite recently. Lamps for burning this oil have been invented by the natives, and these are made to suit their own peculiar taste and economy. The natives prefer kerosene to their own bean or peanut oils, because it is much cheaper. In spite of the strong prejudice of the local authorities to it, on account of its inflammable character, and notwithstanding the stringent orders issued repeatedly for its total suppression, its use is steadily on the increase. The people are not at all daunted by such action, and will secure what seems to them most economical. It is evident, therefore, that the trade is but in its infancy. When the teeming millions of population is taken into consideration, the United States will find no better market in the world than China for this product, as well as other products. Is it not a pity, then, that the United States should lose their monopoly of this trade because the Russians give more care and attention to their packing?

The improvements required are not difficult to attain. It is purely a question of care and labor. Experts have declared repeatedly that the quality of American oil is much superior to the Russian, but the tins and wooden boxes on arrival here are in such a condition as to require repacking. On this account opportunities are given to the unscrupulous godown-keepers to make a little "extra" in surplus oil. It is not an unusual thing to buy a new tin of oil, apparently perfect in every outward appearance, but when opened to find it half filled with water; and there is no way of bringing the culprit to justice or recouping the buyer. This is not all, for I have heard complaints from many sources that the tins are often entirely filled with nothing but sea water. All this is due to the necessity of repacking after the goods have been landed.

The Russian oil has no such disadvantages, for every case discharged from the ship is as clean and in as good condition as when loaded at Batoum. As there is no necessity for repacking there is no opportunity for adulteration.

The Russian packing is in every respect the same as the American, except that the wooden case is made of spruce instead of pine. On this account there is hardly any leakage, and none of the boxes are ever broken.

If Americans can devise some means to prevent the leakage caused by the rusting of the tins and the wear and tear experienced during the voyage from the United States to China, the trade may revive in spite of Russian competition. This will lessen all the chances for fraud so commonly practiced by the godown-keepers here, and the superiority of the "Stella" brand will be reëstablished.

GRUNENWALD,
Acting Consul.

AMOY, *October 20, 1893.*

FUCHAU.

EN ROUTE FROM THE UNITED STATES.

We have no direct importations to any extent of American goods. American products are imported by foreigners, and in some cases by Chinese, at either Shanghai, Hongkong, or Canton, and purchased by the merchants of Fuchau from these importers.

The three most important lines of goods coming to this port from the United States are cotton textiles, kerosene oil, and condensed milk. Small quantities of American wrought wire-nail rods, clocks and watches, canned goods, toys, etc., are also received.

LANDING AND WAREHOUSING.

Goods are landed by lighters (cargo boats) at Pagoda Anchorage, 10 miles from Fuchau, and thus brought to the city. They are placed in good warehouses and are well protected from the elements.

EN ROUTE TO THE INTERIOR.

Goods go into the interior by carriers (coolies), who bear them on bamboo poles. They can be handled to best advantage by being packed in parcels weighing about 100 to 150 pounds. They are usually handled with care.

If they come in much larger or heavier parcels they have to be repacked to go into the interior, which will subject them to interior likin taxes, whereas original packages can go under the ordinary transit pass.

OUTSIDE PACKAGES.

The best material for outside covering depends upon the goods—kerosene in tin cans in wooden cases, two cans to a case; cloth in bales well protected by any waterproof burlap or canvas.

In sending goods to this market, dealers must comply with the instructions sent to them by importers concerning the packing of the same, as there are many peculiarities that may seem unnecessary or even unreasonable which nevertheless are important in China.

DUTIES ON PACKAGES.

Customs duties are not charged on covers, boxes, canvas, or other things used as wrappings.

SAMUEL L. GRACEY,
Consul.

FUCHAU, *September 27, 1893.*

HONGKONG.

EN ROUTE FROM THE UNITED STATES.

American goods come to Hongkong by steamships and sailing vessels, and are not handled or disturbed en route.

LANDING AND WAREHOUSING.

The goods are unloaded into lighters, and from the lighters into warehouses (locally known as "godowns").

EN ROUTE TO THE INTERIOR.

Goods are distributed by river steamers or junks. The size and weight of package need not be considered with Chinese porters.

OUTSIDE PACKAGES.

With respect to the various classes of merchandise exported from the United States to Hongkong, the present mode of packing seems to be generally satisfactory.

The most important articles of export from the United States to China are kerosene and flour. The former is packed in wooden cases, each containing two rectangular 5-gallon tins. It is carried in sailing ships, and a cargo rarely arrives without a large proportion of the packages having been somewhat damaged by sea water, but I have been unable to obtain any suggestion for improvements on the present mode of packing. The flour arrives in what are known as "quarter sacks," weighing about 50 pounds each, and this method of packing appears perfectly to satisfy the requirements of the dealers here.

With respect to the packing of other articles imported into Hongkong from the United States, I can not do better than to give the subjoined extract from a letter received from the largest importer of such merchandise in Hongkong:

> We have great pleasure in stating that the packing of all the goods we have procured for the past ten years from the United States—hardware, clocks, canned goods and provisions, cottons, tobacco, cigarettes, perfumery, soap, oil, lamps, milk, machinery, etc.—has been *par excellence* in every way, giving ourselves and clients every satisfaction. We do not remember ever having made a complaint under this head. We have no hesitation whatever in stating that no European country packs better or more economically, many not half so well. We are unable to offer any suggestion by way of improvement.

DUTIES ON PACKAGES.

Hongkong is a free port, and no duties whatever are levied on imports.

O. H. SIMONS,
Consul.

HONGKONG, *September 2, 1893.*

NINGPO.

EN ROUTE FROM THE UNITED STATES.

One of the peculiarities of China that first attracts the attention of the stranger is the total absence of large packages or boxes.

In packing goods intended for this market too much attention can not be paid to the security of the covers. All American goods are first landed at Shanghai, and thence transshipped to Ningpo by steamer, by sailing vessel, or by small boats via canals. The dealers in the United States who cater to this trade have constantly kept in mind the very important fact that all merchandise is moved by man power. Probably the best way to impress upon our merchants the size and weights best adapted for China is to point out to them the size of the tea chest, the bolt of silk, and the roll of matting. If our merchants conform to the size, style, and weight of these packages, they will be putting their goods in the condition most suitable for this market.

Oils, matches, and iron are brought to Ningpo from Shanghai in small sailing vessels, steamers generally refusing such goods as cargo.

LANDING AND WAREHOUSING.

All other merchandise (foreign) is brought in steamers that generally go alongside of wharves and unload at the dock. The packages are all of a size, and are easily managed by one, two, or three coolies, without the aid of any mechanical appliances. The cargo is then carried into the godowns (warehouses) by being slung to bamboo poles, the poles resting on the shoulders of two men. If the package is heavier than usual, the "bearing" pole is much larger and longer, and a sufficient number of men get under the pole at both ends to carry it.

The aim of the shipping people is, of course, to unload the vessel as quickly as possible, and consequently the cargo is left on the wharves for hours, and is, of course, exposed to the elements, though an effort is made to protect the goods in the event of rain by throwing a covering of matting over them. All goods are under cover in the night time.

It is proper to say here that there is not a wheeled vehicle of any kind in this district, not even a wheelbarrow.

EN ROUTE TO THE INTERIOR.

Man is the "beast of burden." Horses are used only for the post and army. Everything is either carried on the backs or shoulders of coolies or in boats. If the merchant will keep in mind that the merchandise he puts up for the China market is to be carried for, perhaps, hundreds of miles on the shoulders of men, he will realize how very important it is that the package should be of convenient shape and weight.

The boats that carry the merchandise inland are generally about 30 or 40 feet long, not more than 7 feet beam, 1 or 2 feet deep, and carry a crew generally of one or two men, who sleep on top of the cargo, which is shielded from the sun and rain by a straw cover. A day's journey either by land or by water is 33⅓ miles.

A coolie aims to get two packages of equal weight. These are suspended one from each end of his pole, which is raised to the waist or as far as the ropes that are tied to the package will permit. He then stoops and places the middle of the pole on his shoulder, with his left hand guiding the package in the rear and his right resting on the ropes of the package in front. Having arranged all to his satisfaction, he slowly straightens up, and with a "He, ho, he, ho," starts off with a swinging gait, which he keeps up for hours. These coolies generally travel in companies, both for companionship and for better security, and as they jog along over the narrow, rough, stone paths, their heavy burdens swinging from side to side, they laugh and joke and are seemingly contented and happy.

As one travels in the interior, it is with surprise he sees how large is this inland traffic, with boats swiftly sailing through canals or on rivers to remote towns and villages far in the interior laden with foreign and domestic goods for local consumption.

The natural facilities in the way of rivers have been fully availed of and added to by broad and numerous canals, while the footpaths connect with the outlying hamlets.

In the cities far from the sea one sees boxes and bales being rapidly carried along, swinging from poles, that bear familiar names of factories at home.

OUTSIDE PACKAGES.

Though the Chinese manage by sheer strength to move large and cumbersome packages, it can be seen how very desirable it is to have a small, compact package. Therefore, with the view of assisting our merchants, I offer the following suggestions:

Dry goods.—Pack in bolts or boxes; length not to exceed the width of the fabric and not more than 60 or 75 pounds in weight, less if possible; covering to be of close, strong canvas, waterproof, securely fastened; boxes to be fastened with iron bands or else with screws or wire nails.

Groceries.—Pack in boxes, water-tight and, in most cases, tin lined. Flour is the principal article bought here, and should be put up in small packages—say in 5, 10, or 15 pound boxes—or bags placed in a tin-lined box, not to exceed 75 pounds to a box.

Liquids.—Pack in tin (unless corrosive) covered with wood, just as kerosene oil is now shipped, two 5-gallon cans in a wooden box. At all events, vessels holding liquids should be packed in wooden boxes and well protected from the danger of breaking.

Iron manufactures.—Pack in as small and convenient a size as the nature of the article will permit.

Hardware.—The same as iron manufactures; of course, means of protection from rust being provided.

China is a nation of small things. Exports should be packed in as small space and as small quantities as possible, and packed to withstand rough usage. All packages should be covered with waterproof material. A little more expense may thus be incurred, but in the long run it will be more than compensated for by the increased sales.

One of the most important influences upon the sales of American kerosene oil is the manner in which it is packed. The nice, well-made tins covered with neat boxes tend to greatly increase the sales of American oil over that from Batoum, the latter coming here in dirty, leaking cans. The Chinese find use for everything. The tin cans are used for water buckets or put to the various uses of the tinsmith, and the box finds a ready sale. So it would be with the coverings of other merchandise. A bolt of cotton with its clean and durable cover would soon crowd out the bolt without any cover.

A safe rule is not to make any package heavier than what a single man can lift and to cover that package securely.

JOHN FOWLER,
Consul.

NINGPO, *September 27, 1893.*

SHANGHAI.

Immediately upon receipt of circular I addressed the various American merchants in Shanghai, requesting them to give me their views regarding the most suitable manner of packing American goods to meet local as well as transit requirements, in order that I might transmit them to the Department.

The following is a copy of a reply which I have received from the China and Japan Trading Company, that briefly and distinctly covers the substance of the Department's instruction as far as Shanghai is concerned:

> We deal in nearly all classes of imports from the United States, and have no change to suggest in the method of packing, which as at present effected meets the wants and views of our customers.
>
> Goods reach this port by sailing vessels, and from New York by rail and steamers via San Francisco, Vancouver, and Tacoma; also by direct steamers via the Suez Canal, and a small portion by steamers via London and the Suez Canal.
>
> The goods are landed both by covered lighters and at wharves, a portion being in almost every case lightered. All goods are warehoused immediately on landing.
>
> They are shipped to the interior by steamers, native boats, wheelbarrows, and porters, and as at present packed they meet the requirements, as does also the material for packing and the package used.
>
> Customs duties on dry goods are specific, charged only on contents; on other goods, mostly ad valorem on the market value here, which, as cost of package is not separated from cost of contents, may be said to be on the package, as well as the contents.

A. D. JONES,
Consul-General.

SHANGHAI, *September 25, 1893.*

TIEN-TSIN.

EN ROUTE FROM THE UNITED STATES.

Goods come to northern China (Tien-Tsin) via San Francisco and Japan or via London and the Suez Canal, and coming by both routes they are usually transshipped at Shanghai. They are sometimes transshipped at Yokohama coming from the east and usually at London coming from the west.

LANDING AND WAREHOUSING.

Goods are usually landed at the wharves in Tien-Tsin, but in case the vessel is unable to cross the bar at Taku, a small proportion of the cargo is discharged by lighters.

Warehouses are provided at Tien-Tsin, and on arrival goods are either placed in the warehouses, or, if left on the "bund," are thoroughly covered.

EN ROUTE TO THE INTERIOR.

Goods are shipped into the interior by boat or by cart as far as Peking in the north, Paoting Fu in the west, and to an indefinite distance south. Goods for Shansi and for northern Chihli and Mongolia proceed from Paoting Fu and Peking on pack mules. Parcels which go by mules should not exceed 150 pounds, which make half a load, or 470 pounds, which make a two-mule load. The latter size is always to be avoided, if possible, as the rule of Chinese carriers is to charge for two mules the rate for three mules when they carry heavy articles suspended between them.

The usage to which goods are subjected en route to the interior is not particularly rough, but as the roads are bad and the carts springless, goods traveling by cart are severely jolted.

OUTSIDE PACKAGES.

Goods coming from San Francisco need not be packed with as much care as those which come by the longer route via the Suez Canal. Goods arrive in first-rate condition in all of the forms mentioned, but everything liable to be injured by moisture should be invariably protected by waterproof, and also put up so as to make thieving difficult. Cotton cloth should be packed in waterproof bales covered with gunny sacking and hooped with iron. The more delicate forms of dry goods and groceries should be packed in tin-lined boxes. Tin-lined boxes should not be used unnecessarily, however, for trade competition makes the cost of the cases a consideration.

Liquids should be very carefully packed in sawdust or other similar material. Complaint is made here of carelessness on the part of American firms in packing liquids, and I know of cases in which parties have given up ordering American drugs simply because of the excessive breakage in shipments from the United States.

All articles of iron must be thoroughly protected by wooden crates, and here, as in the case of drugs and liquids, complaint is made of careless and slovenly packing on the part of American exporters.

Chinese customs duties are usually ad valorem, and in cases when they are imposed by weight the tare allowance is always liberal, so that no special precautions are necessary to avoid customs charges. While various forms of packages are satisfactory, yet if American exporters are to compete successfully with European exporters greater pains must be taken with all the details of packing. Only in this way can the existing prejudice against American exporters be overcome.

One of our importers has called my attention to the great room for improvement in the shaping of various articles with reference to economy of space. In shipping to the antipodes any saving in this direction becomes an important item. In the line of groceries and canned goods especially, a square or oblong package may mean a saving of 10 per cent in freight over the same quantity in round packages.

C. D. TENNEY,
Acting Vice-Consul.

TIEN-TSIN, *September 19, 1893.*

JAPAN.

HIOGO.

EN ROUTE FROM THE UNITED STATES.

American goods reach this port by steamer direct from New York and Philadelphia and via Liverpool and the Suez Canal; also overland to San Francisco and thence by steamer. A large trade in petroleum is carried on in vessels sailing direct from New York and Philadelphia via the Suez Canal. The handlings and usage to which the goods are subjected en route is reported to be generally not injurious.

UNLOADING AND LANDING.

Goods are landed for the most part in lighters. There is one long pier built and owned by a private company and used almost entirely by the Peninsular and Oriental and the Messageries Maritimes steamship companies.

WAREHOUSING.

Warehouses and sheds are provided at the custom-house; but the accommodation for storage is limited, importers often having to protect their goods from the rain by tarpaulins. Goods are landed in lighters, in which they are well protected from the elements.

EN ROUTE TO THE INTERIOR.

The carriage of goods to the interior is by railroad, coast steamers, sailing vessels (foreign model), native boats and junks, carts, and, to a very limited extent, by pack horses and porters. Packages carried by porters should not weigh over 300 pounds, and should not be over 4 feet in length, 2½ feet in breadth, and 2 feet in height. The carriage is entirely in native hands. The handlings and usage are extra good, the carriers' responsibility for damages being definitely fixed.

OUTSIDE PACKAGES.

The best material for outside covering must necessarily depend upon the character of the goods. For groceries the packages should be boxes, barrels, and sacks; fine piece goods should be in boxes, and the coarser qualities in bales; iron manufactures should be secured in strong boxes, tightly bound with iron hoops. Fine piece goods should be in waterproof boxes.

The principal American goods imported at Hiogo are kerosene oil, raw cotton, groceries (including flour, which is put up in cotton cloth bags), and some heavy machinery. The importers make no complaint in regard to the mode of packing any of the above-mentioned articles except raw cotton, which they say leaves much to be desired in many respects.

(1) The bales are badly made up, being hooped carelessly and unevenly and only partly covered by a common sort of bagging, which allows the cotton to escape and dirt to penetrate.

(2) The tare varies considerably, which is clearly a great disadvantage to buyers (since it is the custom in New York to sell upon gross weights) and an inconvenience leading to disputes at this end between importers and their native customers.

(3) Sometimes the bales are found to have been packed with very inferior cotton mixed with good.

The imports of American raw cotton at this port for the calendar year 1892 amounted in value to $768,843.50 in gold; and the demand, it is confidently believed, would be much greater if the bales were prepared and packed in the same manner as those coming from India or Egypt. During last year a Japanese firm, through a foreign house here, tried the experiment of having a consignment of American cotton resorted pressed, and baled in Liverpool. The bales contained 700 pounds net and measured 27 cubic feet. They were landed in good condition, and it was found that the extra hydraulic pressure applied in Liverpool did not injure the staple in the least. But the cost of repacking reached $3 per bale and put a stop to it. I inclose sketches of the American, Indian, and Peruvian bales as landed at this port.* That of the American shows the condition of worst shipment, with all the hoops off except two. I also inclose photographs of the American and Indian bales with all the hoops complete.* The latter is more compactly baled, the loss from pilfering being thereby reduced to a minimum, and the canvas is much finer and stronger, thereby preventing the penetration of dust and dirt.

Importations from Europe, in bulk, of drugs, chemicals, and liquids have recently been made in small steel drums, the contents being bottled here in bottles manufactured in Japan, the labels used being sent out by the shipper, thus effecting a large saving in freight. The steel drums are returned filled with fish oil, which is extensively used in the manufacture of leather.

During the last year importations of locomotives from the Baldwin works at Philadelphia for use on the Japan railways have taken place, all of which have arrived in excellent condition.

DUTIES ON PACKAGES.

Customs duties are not charged on boxes, barrels, or any other packing materials.

E. J. SMITHERS,
Consul.

HIOGO, *September 22, 1893.*

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*NOTE BY THE DEPARTMENT.—These sketches are not reproduced, as the cuts on p. 140 sufficiently indicate the difference between American bales and those from other countries.

NAGASAKI.

EN ROUTE, LANDING, TRANSSHIPPING, ETC.

Dry goods.—Drills, shirtings, sheetings, and cotton duck (the principal goods under this heading) reach this port via Shanghai and in some cases via Yokohama. In the former case they are shipped at New York by steamer to Liverpool or London, thence to Shanghai via the Suez Canal, and transshipped by steamer at Shanghai; in the latter case they are shipped at San Francisco, reaching that city by rail and Yokohama by steamer, and transshipped at the latter port by steamer for this port. They are landed in lighters and stored in warehouses, and are not exposed to the elements. These goods are taken to coast ports and the interior in small lots by steamers and pack horses. For drills and cotton duck, the present method of packing (fifteen pieces of the former and five to eight bolts of the latter, in bales protected by waterproof covering and covered outside with gunny cloth and roped) seems to answer the requirements. Shirtings and sheetings should be packed in tin-lined cases of one or two hundred pieces, as ordered by the importer, and the cases strapped with iron hoops.

Groceries.—The leading article under this head is flour. It is imported from California and Oregon, that from the former State being shipped at San Francisco to Yokohama and thence transshipped to this port, while that from Oregon is shipped to Vancouver and there transshipped to this port direct. Small lots also arrive here by steamer from Portland via Yokohama. It is shipped in 50-pound sacks and arrives in fairly good condition, sometimes one per cent being lost in weight in transit through handling. It is landed in lighters and stored in warehouses, and is protected from the elements. A large portion is reshipped to the Korean and Siberian ports. The natives send a portion to the coast ports by steamer, and a little by pack horses goes into the interior. For that which is transshipped, it is recommended that two sacks be packed together in a gunny; but merchants ordering should designate the manner in which they require the flour packed, as some parties call for it in barrels of 196 pounds. The 50-pound sacks are the most convenient for the native trade. Condensed milk is imported in lots of 25 to 100 cases from New York via the Canadian Pacific Railway, being transshipped at Vancouver to steamer direct to this port. It is also shipped from San Francisco by steamer to Yokohama and transshipped there hence. This goes to the coast ports by steamer and by pack horses to the interior. The size in which it usually arrives—forty-eight cans, each 16 ounces, in a case—suits the native trade. Canned meat (*i. e.*, roast, boiled, and corned beef) is imported in 2, 2½, and 6 pound tins in cases from San Francisco by steamer to Yokohama and transshipped to this port. It also arrives from New York via the Suez Canal, having been transshipped at Liverpool or London. This is landed in the same manner as flour and is shipped by steamer to coast ports, but does not go into the interior. Various

descriptions of meats are imported from San Francisco via Yokohama in 1 and 2 pound tins in cases of one dozen for local consumption. Salt beef and salt pork are occasionally imported in 200-pound casks by the same routes as canned meats, but they do not go into the interior, being supplied to naval vessels. Casks of 200 pounds, strongly hooped, are the most suitable for this market. Butter, biscuits, jams, jellies, etc., are also imported, mostly by steamer, from San Francisco via Yokohama, and are chiefly consumed by Europeans. To reach the natives these should be packed in one-pound tins of 4 dozen to the box, as importations from Europe are of this size of can and meet with favor.

Liquids.—Refined petroleum is the chief article which comes under this heading. It is imported from Philadelphia in steamers direct via the Suez Canal, also in sailing vessels from the same port via the Cape of Good Hope. It comes in two 5-gallon tins in pine boxes measuring 2 cubic feet. This requires no handling en route and is discharged into lighters and landed in warehouses specially provided for the purpose, and is not exposed to the elements. Some of this is shipped in bond to Korean ports, but the bulk goes to the coast ports by steamers and junks, thence by pack horses into the interior. The present size of the case and mode of packing suit the native requirements. In connection with this article it may be mentioned that Russian refined petroleum has been imported from Batoum in steamers via the Suez Canal on several occasions in cases of the same size and weight as the American article. Lately this importation has stopped, and large iron tanks are being erected here. When completed, it is proposed by a syndicate of capitalists to import Russian petroleum in bulk by tank steamers and then deliver from the tanks into 10-gallon iron drums for shipment into the interior, thus doing away with the case. Whether this mode of packing will meet with the favor of the country people of this district remains to be seen, as they have heretofore been partial to the American article and the American mode of packing, even at a higher cost. Wine, principally claret, is imported by steamers from San Francisco to Yokohama and transshipped to this port. This comes in casks of 50 gallons each, also in cases of one dozen each; that in casks is bottled here and goes to the coast ports and interior in cases of twelve bottles by means of steamers and pack horses. Whisky, sherry, and port also arrive by the same route in small lots in cases of one dozen bottles each; these are not consumed by the Japanese to any extent. Turpentine reaches this port from New York by steamer via Europe and the Suez Canal, also by sailing vessels direct, in two 5-gallon tins in cases in the same manner as kerosene oil. This mode of packing suits the market.

Iron manufactures.—Hardly any goods under this heading are imported from the United States, the European markets almost wholly supplying the demand. A few steam engines and pumps occasionally arrive by steamers via the Suez Canal to Shanghai and are there transshipped to this port and to coast ports by junks and small steamers, and then by pack horses or carts to their destination in the interior. Machinery should be packed in strong cases made in as small packages as possible, as large and heavy packages are difficult to handle and are liable to breakage in transit to the interior. The places where this class of goods is generally required are hilly and the transportation is more difficult than for any other class of goods; besides, the coasting steamers and junks have only appliances for handling small weights and only space for small packages.

Hardware.—Stoves usually arrive by sailing vessels, either direct or via Chinese or other Japanese ports, and are packed singly in crates or wooden frames. They are mostly used by the foreign residents, and only a few by the natives. They go to coast ports by steamer. Scales are imported from New York by steamer via Liverpool and the Suez Canal to Shanghai, thence transshipped to this port by steamer. Some also arrive by sailing vessels direct and require no handling en route. The various methods of packing used at the present time by the shippers meet with the approval of the trade here. The importers of this class of goods are gradually being pushed out of the market by inferior native counterfeits, which sell at half the cost of the American article. A few go into the interior by steamers to coast ports and then by pack horses or carts. The few hand-sewing machines, scoops, and shovels now imported from the United States come by steamer from New York via the Suez Canal, being transshipped at Liverpool or London to Shanghai and thence to this port. These go to coast ports and the interior in small lots. Sewing machines should be packed one in each box and protected inside by waterproof covering. Scoops and shovels have been imported in bundles of one dozen each covered with gunnies only, and have arrived in a more or less rusted condition. Care should be taken to have them packed in a waterproof material. These are used in the coal districts. All these goods are landed to go to coast ports and the interior in the same manner as other goods. European manufactures of these articles have almost taken the place of the American in late years owing to cheapness. Door locks, hinges, bolts, screws, etc., are brought as wanted from Hiogo, and no direct importation takes place worth mentioning. The natives manufacture these articles.

Miscellaneous.—Raw cotton from the Southern States has been imported in lots of 100 bales of 400 pounds each, covered with gunny cloth and hooped with iron bands. This mode of packing suits the native unless otherwise ordered by the importers. Shipments have been made from New York via the Suez Canal to Shanghai and Japan ports. The cotton is landed in lighters and stored in warehouses and goes into the interior in small lots of 1 to 10 bales in various ways—to coast ports by steamers and then to the interior by pack horses or carts. The trade is gradually growing. Clocks arrive by steamers via the Suez Canal, being transshipped at London, and go into the interior by pack horses and to coast ports by steamers. The manner in which the Seth Thomas and Ansonia companies pack their goods—in boxes with waterproof lining—answers the requirements of the trade. Cigarettes and cigarette tobacco are imported in lots of one to three cases of various sizes by steamer from New York to London, there transshipped via the Suez Canal to Shanghai, or direct; some also reach this port from San Francisco by steamer via Yokohama. All arrive in tin-lined cases, the bulk being shipped in New York in bond. Considerable quantities are also reimported from Hiogo and Yokohama by the natives. The goods are opened and repacked in small lots and go to coast ports in steamers and to the interior towns by pack horses; they are also largely consumed locally. Florida water comes in lots of one to two hundred boxes of one dozen bottles each via Shanghai, and direct in sailing vessels, and also by steamers to London and the Suez Canal. This goes to the interior as do other goods, in lots of one to five boxes. The box containing twelve bottles is very handy for the natives. Sheet rubber is the only article of rubber imported direct worth mentioning. It goes to the interior in small quantities for use in the mining districts, and is shipped mostly from New York via London and the Suez Canal and Shanghai. The natives get from Hiogo very small lots of various rubber manufactures as wanted. Tar and pitch are shipped by sailing vessels direct to this port and arrive in a more or less damaged condition, the barrels being generally too weak for the contents. Tar should be packed in 5-gallon tins, or the barrels should be strongly hooped with iron. These products go to the coast ports in small lots, and are also used locally.

OUTSIDE PACKAGES.

In addition to goods going into the interior by pack horses, a large quantity is sent by two-wheeled carts drawn by one or more men without inconvenience. They carry from 500 to 1,000 pounds and packages as large as 6 by 4 by 3 feet.

The size of packages most suitable for a pack horse should not measure more than 2 by 2 by 3 feet, nor weigh over 250 pounds. This size and weight of packages is also most convenient for coast steamers, junks, and boats.

When the contents of a package are heavy, the package should be made proportionately strong, and, in case of a box, dovetailed or iron strapped, and barrels should be iron hooped.

DUTIES ON PACKAGES.

The customs charge duty on invoice cost of goods, less the charges, at 5 per cent if the goods come under the ad valorem list; and, as in many cases the cost of the box, keg, etc., is included in the cost of goods, importers have to pay 5 per cent thereon. If these were separately charged for in the invoice, then importers would be benefited to the extent of 5 per cent on such cost in most cases. The customs have, however, refused such allowance in cost of packing for petroleum. In invoices from Europe the cost of the box, keg, etc., is usually specified in the invoice, and the packages in such case are not liable to duty. In case of goods under the specific list, allowances are made by the customs therefor.

SHIMONOSEKI.

Goods reach the port of Shimonoseki by native steamers and junks from Osaka, Hiogo, and Yokohama. It not being an open port, vessels flying foreign flags are not permitted to carry cargo there except with special permission from the Japanese Government, although certain commodities are allowed to be exported in foreign bottoms by natives only.

The principal import is refined petroleum in two 5-gallon tins in cases measuring 2 feet. The larger portion goes by junks to the west coast of Japan, and the balance, retailed in small lots, goes to the adjacent towns by pack horses and to coast ports in junks. It is landed in warehouses at Shimonoseki and reshipped at convenience of junks. It is only liable to the elements when in transit from vessels to shore if the cargo arrives in steamers; in case of junks, they go alongside of wharves and the goods are less handled.

Turpentine in 5-gallon cans, lubricating oil in original barrels and also in 5-gallon cans, as well as tar in 5-gallon cans, are also imported in small lots only.

All the foregoing are retailed.

Dry goods do not arrive in large quantities, dealers getting a bale or two of cotton sheetings, shirtings, drills, and cotton duck for retail as required, having them packed in such boxes or cases as are at hand, without regard to size. These mostly arrive by steamers. A portion goes to adjacent districts in retail lots, and the remainder is consumed in the vicinity.

Condensed milk in 16-ounce cans and forty-eight cans in a case arrives in lots of one to ten cases by steamer and goes into the country in lots of one or two cases only by pack horse or boat. It is also retailed.

Small quantities of scoops, shovels, scales, force pumps, tools, etc., reach Shimonoseki repacked, and are retailed for use in the neighboring local mines.

Goods such as Florida water, sheet rubber, tobacco, cigarettes, pencils, etc., are all retailed, and go only into the adjacent districts.

All goods landed at Shimonoseki must pass customs at an open port and arrive in vessels carrying the Japanese flag.

MOJI.

This port, now being constructed, situated opposite Shimonoseki, at the western entrance of the Inland Sea, draws some of its goods from Osaka, Hiogo, and Yokohama; but the wants are in a retail way and are mostly supplied by Shimonoseki.

It being closed to foreign trade, like Shimonoseki, goods landed there must pass customs at an open port and be reshipped in craft carrying the Japanese flag. Special permission to land heavy cargo has, however, been granted by the Government on several occasions.

Being the terminus of the railroad running through the central portion of this island, a considerable quantity of goods pass in transit from the northern open ports above mentioned to the interior. These arrive by steamers and are landed and immediately forwarded by railway to stations in the interior; they then go by pack horses or carts to destination.

KUTCHINOTZ.

Kutchinotz is a coal-loading port situated at the entrance to the Shimabara Gulf in the southwestern part of this island (the island of Kieushiu).

Small quantities of petroleum are the only goods consumed by the natives there.

Canned meats, etc., in very small lots are supplied to foreign shipping visiting the port.

All goods are received from Nagasaki by steamers and boats.

W. H. ABERCROMBIE,
Consul.

NAGASAKI, *October 15, 1893.*

JAVA.

BATAVIA.

EN ROUTE FROM THE UNITED STATES.

Goods from the western coast of the United States are received at Batavia via Hongkong and Singapore. Goods from the eastern coast, when not coming direct by sailing vessels, are received via England or Holland. Petroleum is always shipped direct by sailing vessels.

LANDING AND WAREHOUSING.

At Batavia general cargo is always landed at a quay; at other ports on the north coast of Java cargo of all kinds is landed in lighters. Petroleum and explosives are landed in lighters.

There are Government warehouses for all kinds of cargo, except petroleum, which is stored in private stores outside of the city.

EN ROUTE TO THE INTERIOR.

All goods from Batavia to the interior are transported by rail and are carefully handled; for light goods not exceeding 500 pounds in weight horse trucks are used, and for heavy goods *kerbo* (buffalo) trucks. For short distances goods of light weight are transported by coolies.

OUTSIDE PACKAGES.

Dry goods should be packed in cases lined with tin; groceries always in tins, with outside cases; liquids generally in barrels; and iron and hardware, if small, always in cases. Flour from San Francisco is shipped in 50-pound bags. All goods in cases should be in water-tight cases. Some time ago there was a consignment of dried fruits shipped to Batavia from San Francisco, and, after being some four months en route, they were received here in a damaged condition, as they were packed in common cases, without tin linings and not air-tight.

DUTIES ON PACKAGES.

All cases containing goods are opened at the custom-house and appraised by Government officers; therefore, there is no mode of packing that will reduce the duty. On all goods, except stationery and books, there is 6 per cent duty; the duty on stationery and books is 10 per cent. There is very little demand for American goods in Java, and, with the exception of petroleum, little is shipped from the United States to Java.

B. S. RAIRDEN,
Consul.

BATAVIA, *September 15, 1893.*

KOREA.

SEOUL.

EN ROUTE FROM THE UNITED STATES.

The bulk of American goods consumed in Korea, such as kerosene, cotton manufactures, and other manufactured articles, are reëxported from Japan and China—principally from Japan. Aside from the transshipping at Japanese ports, they receive rather rough usage in Korea.

Freight rates are lowest via England and Suez. Railroad rates on bulky goods from Chicago, for instance, to San Francisco are higher than from New York by sea to China or Japan.

The handling which a case receives in the overland carriage from the port to this capital, 30 miles, partly by river and partly by land, a journey of 60 miles, is more than that received on the voyage from New York or London to Korea.

LANDING AND WAREHOUSING.

At all the ports of Korea goods are landed wholly by lighters. These lighters are run alongside a rough stone jetty; the goods are rolled out upon the stones by hand and are then taken by handcart, on the backs of coolies, or by rough bullock carts to the warehouses.

Warehouses are provided, though goods are often damaged by heavy rains during landing.

EN ROUTE TO THE INTERIOR.

During the summer and open months junks are used as much as possible. Small steamers ply between the chief port (Chemulpo) and this capital (Seoul). Even in this case there is a land journey of 3 miles from the river to the city. The land carriage is by means of very clumsy bullock carts or on the backs of oxen, ponies, or men. The carts are very expensive, and the severe jolting over the very rough roads is hard on the contents of large cases.

Bales of sheeting are opened and divided for transport by oxen, one animal easily carrying a bale, half on each side. A pony will usually carry two cases of kerosene on each side—four in all. Two barrels of flour can be carried by one ox, but flour is usually imported in sacks. A pack coolie will carry an organ, boxed, weighing about 300 pounds, from the river, 3 miles distant; but this is an extreme case.

OUTSIDE PACKAGES.

For such goods as sheetings the regular burlap (iron-bound bale) is unquestionably the best; for stores and similar supplies a wire or iron band bound box of three-fourths-inch or one-inch pine of a size suitable for convenient handling, say an average of 18 by 20 by 30 inches, weighing 100 pounds, would answer.

Very fine goods should be sealed in tin-lined cases, though ordinarily a good, tight box, with suitable paper packing, is sufficiently waterproof.

Kegs, barrels, and sacks are objectionable packages.

One firm in San Francisco is doing considerable business in shipping stores to this country for the use of foreigners. Their goods are packed in small cases, are easily handled, and usually arrive in good condition.

Such articles as furniture do badly in crates. They should be packed in strong, closed cases.

Stoves and similar hardware, if shipped in crates, should have all the detachable parts removed to prevent theft.

In conclusion, I may say that though at present the direct shipment from the United States to Korea is small, it will increase when our manufacturers desire it sufficiently to heed the requests of importers.

DUTIES ON PACKAGES.

No duties are charged on the box, keg, etc., only on the contents themselves. Tare is allowed for such packing cases.

H. N. ALLEN,
Secretary of Legation and Deputy Consul-General.

SEOUL, *October 6, 1893.*

MADRAS.

EN ROUTE FROM THE UNITED STATES.

American products reach Madras either by sailing vessels via the Cape or by steamers via the Suez Canal. Transshipment in the latter case is effected either in London or Liverpool, but, as I am informed by importers, chiefly at Liverpool. From the time that steamer-shipped goods leave the United States until they arrive in the Madras harbor they are subjected to no handling except such as is necessary to effect the transshipment.

Imports by sailing vessels are restricted to kerosene oil, and in this case there is, of course, no handling whatever until the arrival of the vessels.

LANDING AND WAREHOUSING.

The harbor here is formed by groins of stone built out from the shore, with narrow breaks for entrances and exits. Steamers are moored and anchored in the harbor and goods are lowered by the steamer's slings into lighters and conveyed either to the pier, which is inside the harbor, or to the shore. Goods are removed from the lighters to the pier by hand-worked cranes, placed on trucks, and run into the custom-house. Goods landed on the shore are carried by coolies from the lighters into the custom-house.

On the portion of the shore inclosed by the harbor there is, of course, very little wave motion and no chance of goods being damaged. In bad weather landing operations are suspended.

There is no exposure at all. Goods are put under cover as soon as landed and kept there until cleared by the consignees.

EN ROUTE TO THE INTERIOR.

Goods intended for the interior are forwarded to their destination, as a rule, by railway, and are conveyed in carts from the custom-house to the railway stations, which are near at hand. The protection of goods during this transit lies, of course, with the owners. At all the upcountry stations there are sheds, and if goods on arrival there have to be forwarded to places some distance from the railway, there is always an ample supply of covered country bullock carts available for the transit.

Goods intended for the portions of the presidency lying along the coast to the north of Madras are carried to their destination by coasting steamers, as there is not at present any railway communication between Madras and the coast ports. Shipment from the custom-house to the coasting steamer is made in the same way as the landing is effected. There are no harbors on the coast, and cargo has to be landed (except at Coconada and Masulipatam) through the surf in masoola boats. From April to August and during October and November there is risk of goods being damaged by sea water while being landed in masoola boats. At other seasons of the year the risk, though it still exists, is comparatively small. At Coconada and Masulipatam there is no surf, and goods are landed in large lighters and exposed to very little risk of damage.

DUTIES ON PACKAGES.

Import duties are levied only upon tobacco, alcoholic liquors, arms, and ammunition, and the duty is assessed not per package, but on the weight or quantity of the goods. It is therefore of no importance, so far as duty is concerned, how dutiable goods are packed.

OUTSIDE PACKAGES.

Dry goods.—The coarser descriptions of cotton fabrics and cotton yarn come in pressed bales, the goods being covered with several thicknesses of stout brown paper and then a covering of tarred cloth, the outside covering being stout gunny cloth. The bales are bound with iron hoops and protected by wooden battens from being cut by the hoops. Packed thus the goods travel well and without much damage. I do not think any better method could be adopted. Finer goods come in wooden cases, zinc or tin lined, and all goods of this description should invariably be packed in this way, as there is otherwise great risk of damage. As regards other goods that come under the heading "dry," it may be taken as a general rule that they should be packed in the tin-lined cases, although they frequently come in wooden cases without lining and yet sustain no damage. Harmoniums and brass musical instruments sometimes come in cases without lining, but importers say that the lining would be an improvement. Pianos are invariably packed in tin-lined cases.

Groceries.—According to the advices of the leading importers here, these articles are generally packed in wooden cases without tin lining, the general opinion being that they travel better in that way and are less liable to fermentation than if they were packed in the lined cases. Some groceries come in casks, and travel well and safely thus.

Liquids.—In bulk liquids must, of course, come in casks. Bottled liquids should be packed either in cases or casks, and it is not customary or necessary to use tin lining.

Iron manufactures and hardware.—It is difficult to lay down any general rule with regard to these goods. Light metal implements travel well in casks. Light machinery comes, as a rule, in cases, and should always be protected from undue movement in the case by stays or battens. Firearms should be packed in cases. I do not learn from the importers that cases used are always tin lined, but I think they should be. Hardware, such as grates, stoves, and many descriptions of machinery come packed in crates or strong, wooden cages, the parts of the machinery being protected from injury by binding straw wisps around them.

The description of package to employ is, of course, governed by the nature of the goods that it is proposed to pack. I am informed by importers that the goods which now come from the United States to this place are, as a rule, sufficiently well packed, though formerly they were not strong enough to stand the voyage and transshipment. It should be borne in mind that very much stouter packages are necessary when the goods have to undergo a transshipment than would be the case if they were brought here direct by steamers from the United States. If packages and their contents do get damaged or broken, I think it is in a large number of cases due to the rough usage, which is, I am afraid, an unavoidable element in the transshipment of goods. The packing of kerosene oil is, of course, thoroughly well known in the United States, and it leaves nothing to be desired.

The impression I derived from interviews with several of the leading importers of American goods was that they had no serious complaint to make against the packing, which they apparently considered equal to that which is observable in the case of English goods. I may add further that goods are, in the course of distribution over this presidency, not subjected to any exceptional treatment that would render special packing necessary or desirable. The packing that has been found suitable for goods in the course of distribution over European countries, well supplied with means of transit, is amply sufficient for this presidency.

F. BONE,
Acting Consular Agent.

MADRAS, *September 22, 1893.*

PHILIPPINE ISLANDS.

MANILA.

EN ROUTE FROM THE UNITED STATES.

Nearly all goods from the United States come from San Francisco via Hongkong, being reshipped at the latter place in steamers to this port.

LANDING AND WAREHOUSING.

Goods are landed from ships or steamers in the bay by lighters, and are not exposed to the elements, being housed by the customs authorities. Flour and petroleum go direct to the merchants' warehouses.

EN ROUTE TO THE INTERIOR.

Goods are forwarded to the interior by rail and to the provinces by coasters, both steam and sail.

OUTSIDE PACKAGES.

Packages should be made strong, well shaped, and as light as possible consistent with safety.

Dry goods.—Plain cotton piece goods, sheetings, and the like are packed for this market in bales, with a covering of burlaps and an extra cover of canvas, bound with iron straps. Printed calicoes, fancy goods of all kinds, toys, boots and shoes, and other light goods are packed in wooden cases lined with tin and hermetically sealed so as to be waterproof and air-tight. The wooden case is strapped with iron bands.

Groceries.—Groceries are usually put up in tin cans and then packed in wooden cases. All goods put up in glass are wrapped in straw and then put in wooden cases. Flour is always put up in cotton sacks.

Crockery.—The goods are packed in straw in crates.

Liquids.—Petroleum is put up in tins incased in wood. The tins now used for oil are too light, and very often on arrival are found in a leaky condition. Liquors and other liquids are put up in bottles, with straw casing, and packed in wooden boxes.

Iron manufactures.—Machinery is shipped usually strapped with wood and iron. Hardware is packed in hogsheads and barrels.

I regret to say that there is no American house here and very little trade direct with the United States. The importers here are mostly English, German, and Swiss.

DUTIES ON PACKAGES.

Customs duties are not charged on the outside package, or on the tin lining of wooden cases, except petroleum cans.

Invoices should show both gross and net weights.

C. H. COWAN,
Consul.

MANILA, *September 15, 1893.*

PERSIA.

TEHERAN.

EN ROUTE FROM THE UNITED STATES.

Before proceeding to deal with the particular questions referred to in the circular, it may be as well to advert briefly to the different trade routes by which Persia may be reached from the west.

Bushire, on the Persian Gulf, and Trebizonde, in Turkey, on the Black Sea, are the principal ports for the debarkation of goods—the former for the southern and central towns and districts and the latter for the west, northwest, and portions of the north of the country, especially Teheran. In addition to these, Bender-Abbas, on the Persian Gulf, receives goods for a few places in the south and southeast, and Bagdad is made the starting point for considerable quantities for the southwest and west, and a few goods are transported some distance inland by the Karun River.

There is still another route, which, though the most direct and expeditious, is, however, only used to a very limited extent. This is by the Batoum-Bakou Railway, from the Black Sea to the Caspian. With proper management goods ought to be sent from Batoum to Teheran in twenty days; then, reckoning three weeks from London to Batoum, only six weeks is consumed in transit—a less time than is occupied between London and Bushire. In order, however, to protect and foster Russian manufactures, the Government has imposed practically prohibitive transit dues; so this route is but rarely taken advantage of, except for the transport of Russian merchandise.

The Turkish Government imposes a uniform transit duty of one per cent on all goods passing through any part of Turkey to Persia.

The time occupied in the transport of goods between London and Teheran varies but little, whether the Trebizonde or the Bushire route be selected; and during six or seven months of the year—from the middle of September to the middle of April—about four and a half or five months are generally consumed. In summer the rate of speed is much slower on account of the owners of the pack animals stopping to graze their beasts wherever pasturage can be found; and it is no unusual occurrence for goods that leave Europe in the spring for Teheran to be eight or nine months en route. The best time, therefore, to dispatch goods from the United States would be about the middle of July, both for the Persian Gulf and the Black Sea.

OUTSIDE PACKAGES.

With regard to packing, considering the long distances that have to be traversed and the slow means of locomotion, the greatest possible care should be observed; and this applies to every possible kind of merchandise, whether the goods be of a perishable nature or not. Most things are apt to be broken or twisted out of shape, and all are liable to be stolen.

Dry goods.—These are packed in bales, with an inner covering of cheap, coarse material wrapped or sewn round them. Over this is a casing of oilcloth, and inclosing all is a well-sewn wrapper of strong canvas, or what is called here "gunny." Sometimes two strong, iron bands are passed round the bales, to keep the contents from bulging out. This precaution, however, is not always taken, although it is a great safeguard.

Groceries.—Loaf sugar is usually packed in very frail, wooden cases, and consequently the loss is often considerable. Tea is packed in chests of 10, 20, or 50 pounds each. The smaller ones ought always to be inclosed in a strong outer wooden casing, or the joltings and rough handling they receive in Persia very soon break them, and the tea leaks out. Coffee is always imported in sacks of various sizes, weighing from 50 to 150 pounds, and inclosed in strong sacking. Spices, such as ginger, nutmegs, pepper, cloves, turmeric, etc., are also imported in bags, but cinnamon generally in small boxes of 7 or 14 pounds each. Sugar, as distinguished from loaf sugar, is imported in bags made of the cocoanut fiber, weighing from 100 to 150 pounds each, with the usual outer covering of sacking. If any or all of these goods are timed to arrive at the port of debarkation for dispatch up the country in the winter, it is advisable to protect them with a covering of oilcloth in addition to the ordinary outer coating of sacking.

Liquids.—Wines, spirits, and liqueurs are nearly always made up into cases of one dozen bottles each, beer and porter or stout of 4 dozen each, bottled drugs into cases weighing from 150 to 160 pounds each, and pickles and jams in bottles to about the same extent. It can not, however, be too strongly impressed upon exporters that bottles should be well corked and capsuled, and, if liable to ferment or if of an effervescent nature, the corks should be secured by strong wire. Glass stoppers should not be used where they can be avoided, as they are so apt, from the dryness of the climate and the continual motion of the liquid, to get loose and be jostled out. All glass bottles, whether containing liquid or not, should be well protected by straw envelopes or coverings.

Iron manufactures.—If of small dimensions, they should be packed with hay or straw in strong, wooden cases, which ought to be strongly hooped on the outside to protect the contents from pilferers. If the pieces should be large and heavy and not of a nature to be easily broken, they can be simply protected by sacking, and thus the additional weight and expense of wooden cases saved.

Hardware.—This class of goods is usually packed in strong, plain wood cases, with either paper, hay, or straw—as may best suit the articles—the case being lined generally with pitch paper, which, if sufficiently strong and well coated with pitch, seems sufficient to protect the goods from the wet. All articles of delicate manufacture, such as clocks, watches, cutlery, surgical instruments, telephones, typewriters, telegraphic apparatus, etc., should always be packed in tin or zinc lined cases.

Crockery.—China and all kinds of crockery and glassware, not being liable to serious damage from the variations of heat, cold, and wet, need only be packed carefully and closely, so as to have as little friction and jarring as possible, although the higher class of lamps, where gilding, lacquering, and other kinds of ornamentation are used, ought to have some better protection than their wrappers and plain wood cases. An oilcloth covering would probably be sufficient.

Miscellaneous.—Haberdashery, including combs, brushes, card cases, cottons, yarns, pins, needles, etc., should be packed in the same way. Cigars, although often packed in plain wood cases, if transported inland in the winter, are apt to get damaged, and the loss incurred is frequently more than would have defrayed the cost of a tin lining for the case. All canned goods—and these include smoking and cigarette tobaccos, which are put up in quarter and half pound hermetically sealed tins—need only be packed in strong, well-hooped, wooden cases.

It may be remarked here, in regard to the preservation of goods from rain or water damage, that rain very seldom falls, except in the forest districts bordering the southern shores of the Caspian for about 20 miles inland, between the middle of May and the end of November; and the really wet season generally begins about the first week of the new year.

LANDING AND WAREHOUSING.

At the ports of Bushire and Bender-Abbas, on the Persian Gulf, Trebizonde, on the Black Sea, and at the Caspian ports generally, with the exception of Enzeli, where cargo vessels frequently come alongside the wharf, goods are landed by lighters. All goods for Bagdad are transshipped at Bussorah into the River Tigris steamers, the water of the river not being of sufficient depth to float the ocean liners.

Warehouses are provided at most of the ports for the protection of goods from the elements. Merchants, however, of any standing have warehouses of their own where they prefer to store their goods if the means of dispatching them into the interior are not at hand.

EN ROUTE TO THE INTERIOR.

All goods are transported into the interior by pack animals—camels, mules, horses, and donkeys. The length of a package, unless unavoidable, should not exceed 6 or 7 feet, though for ordinary merchandise 3 or 4 feet long by 2½ feet wide and 2 feet deep is a convenient size. Each box, bale, sack, bag, etc., should be made up to about 160, or at the utmost 180, pounds, including the casing, whatever that may be, when shipped to Bushire, as camels—which carry a larger load than mules—can not traverse the mountains that lie between Shiraz and the sea.

Packages sent via Trebizonde and Bender-Abbas into the interior can be made up to 200 pounds, as camels go the whole distance. A camel will carry 400 pounds, and a mule comfortably 320 pounds; horses and donkeys not so much.

Merchants, in shipping goods to Persia, should always first weigh about 145 pounds of goods if for a case and 155 or 160 pounds for a bag or sack, and then make the receptacle of the proper size to contain them. If they would attend carefully to these simple directions in the matter of weight, a very considerable saving in transport would be effected. When possible, light and heavy articles should be judiciously mixed in the cases, so as to make them as far as possible of even weight and size. It is advisable, as far as can be done, to pack goods in bales, sacks, and cases. Kegs and barrels are very ill suited to the rough usage of camel men and muleteers, and nearly always get seriously dilapidated before they reach the end of the journey.

With respect to the handling and usage to which merchandise is subjected when transported into the interior, it may be stated as a rule, to which there is no exception, that they are rough and inconsiderate in the extreme; and only by careful packing, casing, and covering will it arrive safely at its destination.

It may be interesting and advantageous to know that the average cost of transport is about 24 cents a ton per mile, although this is sometimes modified by the supply and demand. Only about two months ago, in the town of Shiraz, a large forwarding center, in consequence of the scarcity of animals and a sudden increase of goods, the cost of transport rose nearly 100 per cent.

Each caravan, whether of mules or camels, makes a journey of 16 or 20 miles a day, stopping at every large town or city en route for one or two days to rest the animals.

DUTIES ON PACKAGES.

By treaty rights traders of the most-favored nations, including the United States, pay an ad valorem customs duty at the frontier of 5 per cent on all kinds of goods, which is calculated on the basis of what the goods would fetch if sold at that particular place. But the proceedings of the Persian custom-house authorities are by no means regulated by any law, rule, or method, and consequently some people pay more and some less than the treaties provide for. Native merchants who have no treaty privileges endeavor to make the best terms they can; but, as a rule, unless they have influence and the means of satisfying the working officials in some other way, they have to pay a higher duty than the foreigners. When the stipulated 5 per cent duty has been paid by the merchant, a customs receipt or "pass" is given to him by the customs officer in charge, which secures free transit for his goods to any part of the country. All goods leaving the country pay an export duty of 5 per cent.

It will be seen from what has been stated above that casings pay no duty; consequently the cost of the goods to the importer is in no way affected by any such addition to his ordinary expenses.

CONCLUSION.

It would give me great satisfaction, and I am sure it would be highly appreciated by the Shah, his Government, and people, if more active and closer commercial relations could be projected and established between the United States and Persia.

ALEX. McDONALD,
Minister Resident and Consul-General.

TEHERAN, *October 30, 1893.*

SIAM.

BANGKOK.

EN ROUTE FROM THE UNITED STATES.

What few goods are received here from the United States, such as flour and canned goods, come principally via Hongkong; hence they are only handled once after leaving the United States—at Hongkong, where they are transshipped to this port.

LANDING AND WAREHOUSING.

The landing of goods is about equally divided between wharves and lighters.

Warehouses are provided, and goods are not subjected to more exposure here than is ordinarily the case in any other part of the world.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior principally in steam launches and rowboats, the rivers not being navigable to large steamers for any appreciable distance from this city. Goods are not handled much en route. Once on board here, they are carried to their destination usually in the same boat, which is made possible by the wonderful river and canal communication between all parts of the Kingdom.

OUTSIDE PACKAGES.

Dry goods.—The best material for outside covering for dry goods depends upon the class of goods to be shipped. The finer qualities, such as silks, crapes, etc., are packed in boxes lined with zinc or tin. The cheaper varieties of dry goods, such as calicoes, domestics, etc., are usually covered with the ordinary jute bagging after being first covered with some cheap waterproof cloth. This is considered the best mode of packing this class of goods. No particular attention is paid to the size of the packages.

Groceries.—All kinds are packed in the usual boxes and crates. No special rule is to be followed concerning the size or the packing other than that observed in packing goods for long voyages.

Liquids.—Liquors such as beer, whisky, wine, etc., should be packed in the ordinary case containing not over one dozen bottles each, each bottle being incased in straw.

Iron manufactures.—No particular mode, size, etc., is required in packing iron manufactures, hardware, etc., other than thoroughly wrapping in paper or in any good packing material those pieces which it is desired to protect from breakage or from tarnishing.

No particular size of packages, etc., for shipment to the interior is necessary, because all goods required for such shipment are bought in Bangkok, and the orders from the merchants in the interior are such as to necessitate special packing by the merchants here.

DUTIES ON PACKAGES.

No customs duty is charged on any packing material.

ROBERT M. BOYD,
Vice-Consul-General.

BANGKOK, *September 11, 1893.*

STRAITS SETTLEMENTS.

PENANG.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States reach Penang via British or continental ports, where they are transshipped by steamer to Penang.

LANDING AND WAREHOUSING.

Goods arriving at Penang, either by steamer or sailing vessel, are discharged into lighters, and landed therefrom. There is no wharf at Penang where steamers can unload alongside.

The goods are landed from lighters into a covered shed, but heavy rains and flood tide will at times damage cargo so landed.

EN ROUTE TO THE INTERIOR.

Penang has, properly speaking, no inland trade. Goods are reshipped by small steamers and sailing craft to coast ports. For this purpose the goods are either shipped in original packages or repacked to suit purchasers, which latter could not be done by the manufacturer.

OUTSIDE PACKAGES.

Drygoods.—Drills and sheetings are packed in bales of thirty pieces, lined with oilcloth and packing linen and strapped with iron hoops. All cloth goods should be packed waterproof.

Groceries.—In a strict sense, groceries are not imported from the United States, except canned fruits, which are packed in cases of 2 dozen tins.

Liquids.—These are not imported from the United States.

Iron manufactures.—Very little is done in these, except clocks, which are imported direct by one firm from the United States. English commission houses also execute Penang orders from London for American clocks. Clocks are packed in cases of half a dozen each.

Hardware.—The only goods of any consequence imported from the United States are steel axes, which the manufacturer packs at present in boxes of one dozen. This could be augmented by cases of 5 dozen if it would be cheaper to the maker.

FREDERICK LEDERER,
Consular Agent.

PENANG, *October 11, 1893.*

SINGAPORE.

In response to the Department's circular of the 7th of July last, which I found here upon my arrival, and which called for information concerning the proper method of packing American goods for export, I have the honor to submit the following communication from Messrs. McAlister & Co.:

> Goods arrive in Singapore from the United States by direct boats or by transshipment via England. Direct shipments are preferred, as the goods are subject to no handling or usage from the time they are shipped till landed here, and, as a rule, arrive in much better condition than when shipped via England, as by that route they receive much handling and the cases show signs of rough usage.
>
> Most of the goods we handle do not require to have waterproof casing, but hand tools of all descriptions would be better if thick, oiled paper were used for a lining to the case. Lawn-mowers, weighing machines, and rough hardware do not require waterproof coverings.
>
> We should say ordinary boxes are the best to pack in for our class of goods. Ships' oars, we have found, are better shipped loose than in bundles.
>
> The method adopted by American houses in shipping goods in small cases is no doubt a very good one, as—we being dependent on manual labor—the goods are easily lifted without breaking or straining the cases, which invariably happens when the cases are big and heavy. Another thing, when shipping to the native states, etc., by the small Chinese boats (that hardly ever carry heavy lifting tackle), the boatmen easily handle small cases without knocking them about.
>
> Salted beef and pork arrive in casks, and the packing is all that can be desired.
>
> We really do not think we can suggest anything that could improve the American method of packing in the goods we handle—hardware, writing machines, buggies, ships' oars, and salted beef and pork.

The following is from Messrs. Katz Bros.:

Our trade with the United States could be larger if it were not for the high rate of freight occasioned by the transshipping in Liverpool of most goods. A few more direct steamers from the United States to the Straits Settlements would reduce the time of transit considerably and increase business between the two countries.

The United States should send out more travelers in order that American goods should become better known.

If direct shipment is obtainable we invariably take it, otherwise we have our goods transshipped in Liverpool by the Holt line of steamers.

Transport from Singapore to the interior is by steamer or sailing vessel to outlying ports; thence to the interior by different ways, mostly by small craft.

Pine is generally used as a material for packing cases or barrels. Packages should be made strong enough to bear the weight of their contents. Waterproofing is not required.

American products are received by us packed as follows:

(1) Axes, in boxes of one dozen; handles, in bundles of one dozen.

(2) Beer, in cases of 4 dozen quarts and 8 dozen pints.

(3) Copper paint in cases of ten tins, each tin one gallon, for painting wooden ships, native craft, etc.

(4) Canned fruits, in cases of 2 dozen tins; tinned salmon and lobsters, in cases of 4 dozen tins.

(5) Petroleum, by sailing vessels and steamers, in cases of two tins, each 10 American gallons of 65 pounds weight of oil, Abel's 76° test.

(6) Plated ware, in casks.

(7) Rifles, in cases of twelve pieces.

(8) Chewing tobacco, in cases of 8 caddies, each 20 pounds.

(9) Smoking tobacco, in cases lined with oilcloth, of four hundred tins, each tin one-fourth of a pound.

(10) Clocks, in cases of six pieces.

The above firms are the leading importers of American products in Singapore, and are, of all those to whom I addressed myself on this subject, the only persons who vouchsafed intelligent replies to the questions propounded. In these communications will be found the answers to the first, fourth, and fifth interrogatories of the circular, the remainder of which I beg to reply to myself as below.

LANDING AND WAREHOUSING.*

Goods are landed from vessels at the port of Singapore both at the wharves and by lighters, usually at the wharves.

Ample warehouses are provided, and goods are not liable to be exposed to the elements.

DUTIES ON PACKAGES.

No customs duties are charged on the box, keg, etc., here or elsewhere in this colony.

E. SPENCER PRATT,
Consul-General.

SINGAPORE, *November 7, 1893.*

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* A plan of the docks and wharves of Singapore, transmitted by Consul-General Pratt, is filed in the Department.

TURKEY IN ASIA.

BEIRUT.

EN ROUTE FROM THE UNITED STATES.

There being no direct communication with the United States, American goods reach this district by steamships via Liverpool or Marseilles, which entails heavy freights and other petty expenses on all American merchandise consumed in Syria.

American groceries are imported via London. Tin cans of various shapes that can hold 3⅓ ounces or 6⅔ ounces for all sorts of candies, jams, pickles, meat, fish, etc., and thick glass bottles and flagons or earthenware jugs having a capacity of 2 or 3 pints for all kinds of liquids, wrapped thickly in straw and placed in strong, wooden boxes, are all that can be desired to effect a safe and satisfactory importation of those commodities from the United States to this part of the Turkish Empire.

Petroleum is the only American liquid that appears in the Syrian markets. The way in which petroleum is brought to this country—in strong, wooden cases containing each two tin cans, both holding 65 pounds (net) of oil—is a most satisfactory one, and all the leading petroleum merchants who have been consulted on the subject agree that it is the only proper method that could be adopted to suit the Syrian market. The wooden cases measure, as a rule, 14¾ inches in height, 19½ inches in length, and 10½ inches in width. The wood used for the Russian petroleum cases being of very bad quality, the damage suffered thereby has always been very considerable.

Sewing machines are the only article of iron manufacture imported from the United States. The packages—wooden frames—in which they are received leave nothing to be desired, except the wrapping of the leg parts in hay, as fracture of the latter usually occurs to an extent of nearly 5 per cent.

The best manner of packing hardware for this market is to have each article wrapped either in thick paper or straw and carefully arranged in good, strong boxes, bound with iron hoops.

UNLOADING AND LANDING.

Goods are landed at this port from steamers or sailing vessels by means of large, open lighters, which frequently subjects them to serious damage from rain and sea water. The French company of the port and quays of Beirut are constructing excellent wharves, which have not yet been completed. It is expected that the cargoes of all small steamers will be discharged at these wharves without the aid of lighters.

WAREHOUSING.

Goods discharged in the port of Beirut are, as a rule, stored in the warehouses belonging to the custom-house, which are, by the way, inadequate to store the quantities of merchandise that come from all parts of the world to this city—the main seaport of three Syrian provinces. Once, when a number of steamers and sailing vessels arrived simultaneously, the warehouses being found insufficient to contain all the cargoes, a large portion was placed in the streets adjacent to the custom-house, where, as a matter of course, it was exposed to the elements. But large storehouses have been recently constructed by the French company, and it is expected that in the future more care will be taken of goods landed at this port.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior on the backs of mules, camels, and, sometimes, donkeys, which means of transport are most defective, as the bales are generally pressed too tightly with ropes, in order to lessen their bulk as much as possible. This handling, together with the continued shaking to which they are subjected all along the route on the backs of animals, to say nothing of the daily loading and unloading when the distance is considerable, results often in serious damage to the goods. Besides these modes of transportation, there is another, which is preferable—the wagons of the French company. This mode, however, is not often adopted, on account of the high rate of freight charged, and of the further fact that these wagons run only between Beirut and Damascus.

Mules being the beasts of burden which are almost always used in Syria for the transportation of merchandise from one city to another, the most suitable packages are those that measure about 40 inches in length by 20 inches in width and height. Such packages should never weigh more than from 80 to 93 pounds each. Two of these packages constitute the burden of a mule, while three form that of a camel. The conveyance of loads from one place to another within every eastern city is effected by means of porters. The sizes and weights for them should be the same as those for mules.

When the merchandise is not intended for transport to the interior, the above-mentioned sizes and weights may be doubled.

OUTSIDE PACKAGES.

The best material for outside packages is tin covered with wood for expensive articles, such as velvets and other silk stuffs. Solid, wooden boxes with iron hoops will answer for groceries and hardware. Thick canvas, lined with oilcloth and bound with iron hoops, is all that is necessary for bales of dry goods. Sacks or bags made of canvas are most suitable for coffee, rice, and other similar articles. Barrels are much preferred to tin boxes or cans for all sorts of liquids.

All packages exported to this country should be waterproof if containing articles that may be damaged by rain or sea water.

DUTIES ON PACKAGES.

No customs duties are charged on boxes, kegs, barrels, or any other kind of receptacles when containing any sort of merchandise. Empty receptacles are, however, subjected to a duty of 8 per cent ad valorem when imported to this country as articles of commerce, whatever may be their size and weight.

CONSTANTINE KHOURI,
Acting Consul.

BEIRUT, *September 18, 1893.*

SIVAS.

EN ROUTE FROM THE UNITED STATES.

Goods reach this district chiefly by the Black Sea ports of Samsoon and Trebizonde. Very little comes by the Constantinople-Angora Railroad. In the latter case the seaport handling is essentially like that at Samsoon and Trebizonde, and distribution from the railroad stations to places off the line is very much the same as from the seaports mentioned to the interior. Shipping directions, therefore, for goods entering by Samsoon and Trebizonde apply to all goods entering the district.

The objections to the railroad route are the high rate of freight, the trouble and expense of transshipment from the vessels at Constantinople to the railroad, and the fact that transportation from the railroad to places off the line is about as expensive as from Samsoon to the same places.

As no vessels come regularly from the United States to Black Sea ports, and goods must therefore be reshipped in European ports, care should be taken that goods intended for this district (unless they are to come by railroad) are reshipped in steamers that come to Samsoon or Trebizonde, in order to avoid loss of time, handling, and reshipment at Constantinople.

LANDING AND WAREHOUSING.

Vessels are unloaded by lighters, which are rather clumsy rowboats. The harbors are poor, without much shelter, and in consequence the goods are subjected to extra risk of wetting.

Warehouses are provided at the custom-house wharf, and also by forwarding agents at the ports.

EN ROUTE TO THE INTERIOR.

Goods are shipped to the interior by means of caravans of camels, horses, and donkeys and in wagons. The camel train is to be preferred, unless time is an important element. Camels make about 12 miles a day, horses and donkeys 16, and wagons 25 to 30 miles a day. The expense is about the same by each. The camel carries his load with less shaking, with less wear and tear to the goods, and, as he kneels down to have his load removed, there is less danger of breaking open the packages in unloading. By any method except by wagon the goods are unloaded once a day, either at night or morning, according as the traveling is done by day or night, and they are left on the ground when unloaded. The goods are exposed to extremes of heat and cold, rain and snow, according to the season. There is practically no shelter for the caravan. The wagons afford moderately fair shelter. The number of wagons employed in this business is small. Goods carried by horses and donkeys are subjected to much rough usage. It is customary for European shippers to send dry goods, cotton, etc., in large packages, and these are divided by the forwarding agents at the seaport into smaller ones suitable for the means of transportation.

All cloths should be shipped in bales. Nice goods—silks, velvets, etc.—should be put into the inner part of bales of cotton goods, so as not to be injured by moisture and the binding ropes.

For camels each package may weigh from 200 to 280 pounds; for horses, 150 to 200 pounds; for donkeys, 75 to 80 pounds. For wagons each package should not exceed 1,200 to 1,500 pounds. Some wagons carry as much as a ton, but it is better that the packages should not weigh more than 150 or 200 pounds.

Boxes are regarded as preferable to kegs, except for nails and the like. Boxes ride better on the horses and camels. About 20 by 20 by 36 inches is the extreme size for a box.

OUTSIDE PACKAGES.

All goods, including those in boxes, should be protected by waterproof coverings; tarpaulin is generally used. Eatables should be securely covered to protect them from the hungry caravan drivers.

Goods should be very tightly packed to avoid rubbing and wear caused by the great amount of shaking on the road. The best roads are rocky and rough. The wagons have no springs.

All delicate and fragile goods should be in separate boxes in the packing case. It is best not to put heavy goods in the same packing case with fragile goods, because the repacking at the custom-house is often careless and scale weights may get mixed up with lamp chimneys.

DUTIES ON PACKAGES.

Custom-house duties are not charged on boxes, kegs, etc.; but cottons wrapped about silk are dutiable.

M. A. JEWETT,
Consul.

SIVAS, *August 22, 1893.*

AUSTRALASIA.

NEW ZEALAND.

AUCKLAND.

EN ROUTE FROM THE UNITED STATES.

Nearly all the American goods that reach this colony (New Zealand) come in sailing vessels from New York and in the mail steamers running between San Francisco, Auckland, and Sydney, New South Wales, together with an occasional shipment of small quantities via London. The great bulk of American goods, however, is brought here in sailing vessels loaded at New York. With very rare exceptions, sailing vessels call at two New Zealand ports. Goods, therefore, properly packed and stowed at the port of shipment are not again handled until discharged at the port of delivery.

One cause of considerable complaint by consignees is that small and inferior foreign wooden ships are two often employed, which, to the great annoyance and inconvenience of those interested, results in long passages and sea damage.

LANDING AND WAREHOUSING.

Goods are landed from the vessel and placed in large sheds for storage and examination at all New Zealand ports with the exception of Lyttleton, where the goods are taken from the ship and placed in railway freight cars and taken to Christ Church to be warehoused. There are good wharves and warehouse accommodation at the several ports in this colony where American goods are delivered.

EN ROUTE TO THE INTERIOR.

There being good railroad accommodation, most of the articles intended for the interior are shipped on the railways and from the railway terminus to the outlying districts in wagons. There is very little carried on pack horses into the rougher portions of the country, and whatever is done in this way, the packages are usually small, being prepared specially by the local storekeepers or the wholesale dealers, as the case may be, to suit the requirements of their customers.

I have made considerable inquiry among business men in connection with this feature of the subject, but none of them could offer any practical suggestions of value as to the uniformity and dimensions of packages.

OUTSIDE PACKAGES.

Dunedin merchants allege that American stoves, which are shipped there in large quantities, would be better without any outside covering whatever, but should be stowed tightly and packed with straw in the ship's hold instead of being cased. This applies to all other goods of this description, except castings, etc., which should be packed in strong kegs or cases well rammed with straw or some similar substance. All articles which come under the head of hardware should be packed in cases of suitable size, except wire nails, which, on account of weight, are better packed in strong kegs. Valuable dry goods and musical instruments should be packed in zinc-lined cases.

Auckland importing merchants say that the best material for outside covering is strong casing, of as little bulk as possible, that is consistent with safety. Many who are engaged in the dry-goods trade say that a large portion of the goods they import would be perfectly secure if packed in water-tight bales but for the very common practice of using hooks in handling, by which much damage is done. Fruit jars are frequently received in very bad condition. Straw should always be used for packing, as hay has not sufficient elasticity, and the cases should be made considerably stronger than at present. Instances are reported where packages have been received by consignees tied up with ropes. Lamp goods should be packed as now, in barrels.

A leading hardware firm in Christ Church complains that the cutlery imported by them from the United States often arrives in a rusty condition, which largely detracts from its value and injures the sale and reputation of the article. This damage they attribute to the want of waterproof packing, and they suggest that tarred paper or waterproof material of some kind should be used inside the cases.

It is a general complaint with importers that kerosene tins are not strong enough to carry the oil safely, and when extra handling is necessary sometimes heavy loss is sustained by leakage caused by the weakness of the tins.

The cases containing clothes pegs are often made too slightly and are too easily opened, with the result that loss of contents frequently takes place by their dropping out or getting broken in handling. Importers complain that they are seldom landed in good condition, requiring repacking or being delivered in bags, etc.

Complaints are made that the cases in which California raisins are packed are made too slight to carry the contents with safety, as they have to be transshipped from the mail steamer at Auckland to coast steamers and carried to the different New Zealand ports before reaching consignees. In many instances the goods are received more or less damaged and short in contents.

The leading grindery and leather houses generally report most favorably upon the packing and packages received, such as shoe pegs in barrels, Hungarian nails put up in boxes inside cases, leather, rubber goods, blacking, glass, etc., in cases; and can not suggest any improvement in the present mode of packing.

Ordinary cotton goods should be packed in bales, with tarred canvas covered with canvas wrapper, and banded with hoop iron, and finer goods in tin or zinc lined cases.

As freight is an important item, it should always be borne in mind that packing should be reduced to as small a compass as possible to save space, and casing material should be as light and small as may be deemed consistent with safety.

One hardware importer in Auckland says that "the American system is far preferable to the English, but it might be improved upon by avoiding the repetition of numbers on different packages comprising the same shipment."

The unmistakable consensus of opinion among importers of American goods is that the packages and packing are greatly superior to English packing, and, indeed, to any foreign packages from countries doing business with this colony. With the exception of the few instances enumerated, there is general satisfaction expressed on all sides as to the perfection and stability of American packages. The consular agents at Dunedin and Christ Church, who have interviewed the leading importers in their respective cities, report as follows:

> *Dunedin.*—Speaking generally on the subject under review, after many conversations with American importers, I have no hesitation in saying that the packing of American goods which arrive at this port is such that there is scarcely any room left for improvement in any department. Importers and merchants generally speak unreservedly in terms of highest praise of American-packed goods as compared with other countries.
>
> *Christ Church.*—It is worthy of note that in nearly every instance importers of American goods are lavish of praise of American-packed goods, with especial reference to reapers, mowers, binders, lawn-mowers, lamps, and lamp ware, etc.

It is very gratifying to know that this good opinion is almost universal throughout New Zealand, and that our exporters have taken such pains in packing their goods for this market that there is practically little left to be suggested by way of improvement on our present system.

DUTIES ON PACKAGES.

Where it is the trade custom to charge buyers of goods with the cost of the package in their invoices, duty is charged thereon at the same rate as upon the contents if ad valorem; but where goods are charged by weight, no duty is collected on the casing.

Ad valorem duties range from 5 to 25 per cent, and only on packages containing ad valorem goods is duty collected.

JNO. D. CONNOLLY,
Consul.

AUCKLAND, *October 23, 1893.*
No. 160——17.

VICTORIA.

MELBOURNE.

EN ROUTE FROM THE UNITED STATES.

The great bulk of goods from the United States arrives at Australian ports by sailing vessels direct from New York or Boston; but tobacco, cigarettes, and other valuable goods occasionally come by steamer via Great Britain or by steamer from San Francisco to Sydney, New South Wales.

LANDING AND WAREHOUSING.

All sailing ships from New York or Boston land their cargoes directly on the wharves, but goods coming via Great Britain are occasionally unloaded by lighters, which are available when required. Sheds and warehouses are provided, in which all goods liable to be damaged by exposure are stored pending examination by the customs department.

EN ROUTE TO THE INTERIOR.

To nearly all the business centers of any importance in the interior goods are transported by rail. When merchandise is consigned to localities that are not reached by rail, it is usually transported by wagon or cart.

Merchandise of all descriptions reaching Australian ports from the United States is not at present sent direct from the ship by rail, but is usually carted to the warehouses.

OUTSIDE PACKAGES.

Cases should be made of strong lumber, and of a size that can be easily handled; a great deal depends upon the character of the goods.

Castings, such as hollow ware, should be packed in casks, as the moving of casks is less likely to cause breakage than is the rolling over on their edges of cases.

Stoves should be packed in strong cases. The practice is to pack them in skeleton crates, and consequently they frequently land here in a damaged state, the projecting parts suffering most, the corners of the top plates being very often broken.

Generally speaking, the present methods of packing goods in the United States is satisfactory.

With regard to packages being water-tight, this is essential for electroplated ware, cartridges, clocks, etc. It would also be a great advantage to have edge tools packed in waterproof cases; but for general goods, it is only necessary that the cases be well lined with waterproof material and plenty of packing.

DUTIES ON PACKAGES.

No duty is charged on the outside package in which goods are ordinarily imported; but, if dutiable goods are packed in small boxes and a number of such boxes packed in a large outside case, then the inner small boxes are subject to the same duty as the article which they contain.

Such articles as Saratoga trunks are subject to duty even if used as outside packages.

DANIEL W. MARATTA,
Consul-General.

MELBOURNE, *September 27, 1893.*

POLYNESIA.

FIJI ISLANDS.

LEVUKA.

INTRODUCTION.

After consulting the merchants of the only two ports of entry in Fiji—Sura and Levuka—as well as my own experience as an importer and exporter little can be suggested by way of improvement in the present system either as to packing or packages of the class of goods imported here from the United States.

While there is a considerable quantity of American canned goods, hardware, and kerosene used in this colony, there are no direct shipments with the exception of those few coming here on an occasional sailing vessel chartered in San Francisco, Cal., to bring lumber from Port Townsend and Puget Sound to Fiji.

EN ROUTE FROM THE UNITED STATES.

The main bulk of the supplies of American goods are shipped from San Francisco in steamers, and from New York in sailing vessels, to merchants in Auckland, Melbourne, and Sydney. From these ports the Fiji merchants get their supplies principally by steamers making regular trips between the ports of New Zealand and Australia and Fiji.

The Huddart, Parker & Co. line of steamships, making regular trips between Vancouver, British Columbia, and Australian ports, are to call at Fiji en route, which will bring Fiji into more direct communication with the United States and will no doubt increase our imports and exports.

LANDING AND WAREHOUSING.

Goods are landed from ships' tackles on trucks running along the wharves. Warehouses are provided, and goods are not exposed.

EN ROUTE TO THE INTERIOR.

Goods are shipped by small steamers and sailing vessels along the coast and up the largest rivers of these islands. The only handling they are subjected to is when taken ashore on the small boats and carried into the stores by native porters.

Pack horses are not used. The size or weight of a package seems to be immaterial, so long as it is strong. If one native can not carry it, others are there to help place it where it is wanted.

OUTSIDE PACKAGES.

Dry goods.—This covers by far the largest class of goods imported here, and amounted to $233,388.92 during 1892, all from Great Britain and Germany via Sydney. The goods are packed in large, wooden cases made of one-inch pine boards. Usually these cases are lined with tin or zinc, and are hermetically sealed after the goods are packed, thus preventing damage from moisture; it also makes a stronger package by having bands of hoop iron on the outside. The cubic contents are from 10 to 25 feet. These cases always arrive in good order, and are then cut down for smaller packages to suit the interisland trade. Dry goods are in ever-increasing demand by the native islanders, who can now appreciate a better class of goods than the flimsy cottons they have hitherto been obliged to take. This trade is well worthy the attention of our American manufacturers, who would find a further outlet for their manufactures.

Groceries.—The only goods under this head imported from the United States are canned salmon, lobsters, and dessert fruit. The usual packing of these goods can not be improved upon, unless it is to put bands of wire or thin hoop iron round the cases to prevent pilfering.

Liquids.—The whole importation of kerosene comes from the United States via Sydney and Auckland. The method of packing is in 5-gallon tins, two in each case. They reach here in very good order, and there is little leakage. The heavy duty of 30 cents per gallon on low test and 18 cents per gallon on high grades to a large extent prevents consumption. The amount imported into the colony in 1892 was valued at $10,799.

Iron manufactures and hardware.—The small quantities that come under this head give satisfaction. There seems nothing to suggest either as to packing or packages. They arrive in good order.

The great difficulty of our climate, which is most destructive to all classes of goods, is the quantity of moisture in the atmosphere. Even canned goods do not last long in this climate, and, while I would advise due care to protect goods from moisture, it should be done without making the outside packages any larger than is necessary to hold the goods securely together, as any enlargement of packages adds to the freight, this being charged according to measurement. With this end in view, the exporter will be best able to judge of the requirements of the outside package, according to the nature of the goods to be exported.

DUTIES ON PACKAGES.

Customs duties are not charged upon outside packages in any form.

BENJAMIN MORRIS,
Vice-Commercial Agent.

LEVUKA, *November 13, 1893.*

NEW CALEDONIA.

NOUMÉA.

EN ROUTE FROM THE UNITED STATES.

Goods from the United States arrive here thus: Lumber, direct from the Pacific States; all other goods, via France or Australia.

LANDING AND WAREHOUSING.

Goods are landed in this port from the vessels at the wharves or quays. There is a customs warehouse to shelter everything liable to damage by exposure.

EN ROUTE TO THE INTERIOR.

Shipments to the interior are made by steamers or sailing vessels. From the divers landing places on the coasts they are carried to the settlements on carts, etc.

OUTSIDE PACKAGES.

All sorts of packages are used, according to the nature of the goods. All packages containing delicate goods should be waterproof.

Dry goods imported in this colony come in pine or deal casks measuring from 10 to 40 cubic feet, according to the weight of the goods which they contain. The cases are lined with tin or zinc.

Groceries contained in glassware, bottles, jars, etc., are packed in cases measuring from 4 to 5 cubic feet. All sorts of packing are adopted to protect the goods against breakage. Spices, dried fruit, essences, extracts of meat, dried vegetables, etc., are generally in tin-lined cases.

Liquids in bulk are contained in casks of from 25 to 100 gallons, or in cases containing from twelve to forty-eight bottles.

Iron, steel, or other metal goods are packed, according to the nature of said goods, either in crates, simple cases, or tin-lined cases for fine tools, knives, or polished metal goods.

Hardware should be packed the same as iron and steel.

Salt meat or fish are imported in kegs and barrels; dried fish in tin-lined cases. American manufactured tobacco—twisted, flat figs, or plugs—arrives here in all the American modes of packing, the packages being suitable for the trade of this colony.

The most suitable manner of packing to meet the requirements of importers of this colony, is the largest size cases possible, provided the weight is not over one-fourth of a ton each.

There are no transit business operations in Nouméa worth mentioning.

DUTIES ON PACKAGES.

No customs duties are charged on the packages when they are necessarily made to protect the goods.

L. LE MESCAM,
Commercial Agent.

NOUMÉA, *October 14, 1893.*

SAMOA.

APIA.

EN ROUTE FROM THE UNITED STATES.

Goods reach this port from the United States by steamers and sailing vessels from San Francisco, and are not subjected to any handling en route.

LANDING AND DISTRIBUTION.

Upon arrival here they are landed in lighters, and are liable to exposure to the elements. Goods are distributed about the group by means of boats or small schooners.

DUTIES.

Customs duty is 2 per cent ad valorem upon all goods except liquors, tobacco, and gunpowder. The duty on spirits is $2.50 per imperial gallon; on still wines, $1 per imperial gallon; on sparkling wines, $1.50 per imperial gallon; on beer, 50 cents per dozen reputed quart bottles; on tobacco, 50 cents per pound; on cigars, $1 per pound; on gunpowder, 25 cents per pound.

OUTSIDE PACKAGES.

Boxes are the best packages, and should be as nearly water-tight as possible.

About the only dry goods imported from the United States are prints and a small lot of other cotton fabrics, such as sheetings, drills, duck, and denims; also denim overalls and men's undershirts. Woolen goods can be bought much cheaper in Europe or in the Australian colonies.

All groceries for this trade, especially flour, meal, and biscuits, must be put up in hermetically sealed tins or glass, as exposure to the air in this damp, warm climate very soon ruins them. Everything if so exposed becomes filled with weevils. Comparatively little in the general grocery line is imported from the United States, the most coming from Europe. Our principal direct imports in this line from the United States are flour, biscuits, and salmon.

Strange to say, hardly any coal oil comes here from the United States. This article, although of American production, is cheaper in the Australian colonies than in San Francisco.

Barbed wire is another American product which can be bought for less in the colonies than in California.

W. BLACKLOCK,
Vice-Consul-General.

APIA, *October 10, 1893.*

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Vol. XLIV. FEBRUARY, 1894. No. 161.

TRADE OF TAHITI—1892.*

EXPORTS.

Mother-of-pearl shell.—Five hundred and ninety-three tons of pearl shell were exported to all countries during the year 1892, the gross value of which was $334,989. This article has steadily increased in value since the year 1888, and from the latest returns the prospect is fair that it will bring a still higher price in the markets of America and Europe.

Cotton.—Owing to the general depression in the markets of the world during the year 1892, Tahiti cotton has been very little in demand, and the local prices prevailing are so low that most planters are disgusted with cotton-growing, and it is feared that unless a steady price can be obtained they will discontinue culture. During this year there were 463,234 pounds of cotton exported in bales, valued at $68,140.80. It is the smallest cotton export of the colony for many years.

Vanilla.—Vanilla beans have decreased greatly in value during the past two years, owing to the overstocking of the San Francisco market. During the month of December they enhanced slightly in value; but no marked improvement can be reported, and, in my opinion, none will be realized until the 15 tons of Tahitian vanilla in San Francisco are sold. America is the largest market for the Tahitian vanilla, and all grown on this island finds a market there, with perhaps the exception of about one ton, which is sent to other countries. This year there were exported to all countries 25,560 pounds of vanilla, valued at $28,599.

Copra.—There were 4,275 tons of this article exported during the year, which shows a decrease of 1,852 tons as compared with the year 1891, the gross value being $219,030. The value of copra is less than in 1891, owing again to the depressed value in the European markets. I know of no reason why the amount of copra should have fallen off so much this year, except that the Paumotu Islands experienced very wet weather during the last months of the year.

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* Reference is made to No. 147, p. 634.

The total value of exports for the year 1892 was $607,820 in United States gold, which shows a decrease of over $200,000 as compared with the year 1891.

Exports from Tahiti during 1891 and 1892.

Articles.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
Bèche de mer ... pounds	24,600	$1,651.20	13,330	$1,184
Cocoanuts ... number	665,660	11,563.20	861,872	16,795
Coffee ... pounds	76,600	12,315.60	15,660	2,813
Copra ... tons	4,275	219,030.00	6,127	368,760
Cotton:				
In bales ... pounds	463,234	68,140.80	272,246	102,490
Seed ... tons	156	1,752.00	645	7,267
Desiccated cocoanut ... pounds	34,865	3,307.20	85,606	7,709
Fungus ... do	26,358	1,641.60	39,833	2,779
Hides ... number	823	729.60	5,717	1,344
Mother-of-pearl shell ... tons	593	248,140.80	598	242,275
Oranges ... number	2,884,000	10,147.20	3,568,000	12,691
Trees (oranges, etc.) ... do	....	....	320,000	3,667
Vanilla ... pounds	25,560	21,206.40	24,585	35,789
Wax ... do	2,240	480.00	4,294	797
Wool ... do	61,562	7,642.40	8,091	845
Other	....	72.00	....	696
Total	....	607,820.00	....	807,831

IMPORTS.

The imports for the year 1892 show a decrease in value of $144,000 in United States gold. This decrease is due, first, to the new tariff regulations, and, second, to the general depression of all business in the colony, which has caused merchants to become very careful in the purchase of goods. Besides, many business houses were overstocked at the beginning of the year.

Imports during 1891 and 1892.

Articles.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
Live stock	....	$11,558.40	....	$15,168
Salt provisions	....	27,988.80	....	49,512
Flour ... pounds	2,255,776	50,784.00	2,605,354	60,096
Rice ... do	442,721	10,396.80	483,452	11,765
Biscuits ... do	392,300	11,505.20	428,948	15,293
Beans ... do	39,392	931.20	53,383	1,373
Potatoes ... do	227,741	1,828.00	263,448	2,573
Sugar:				
Refined ... do	296,830	14,318.40	294,910	14,813
Brown ... do	140,643	4,521.60	113,042	3,705
Tea ... do	7,411	1,747.20	6,642	1,603
Coffee ... do	48,485	6,547.20	9,154	1,465

Imports during 1891 and 1892—Continued.

Articles.	1892.		1891.	
	Quantity.	Value.	Quantity.	Value.
Olive oil ... gallons	1,412	$2,232.00	1,767	$2,880
Vegetables ... pounds	6,769	1,243.20	7,781	2,372
Onions ... do	67,690	1,108.80	69,628	1,195
Wheat ... do	58,658	918.80	145,512	1,157
Barley ... do	331,368	3,590.40	505,927	5,703
Oats ... do		24.00	2,919	48
Bran ... do	58,150	528.00	63,967	696
Opium ... do	318	1,219.20	1,715	6,447
Wine:				
Red—				
In casks ... gallons	12,497	3,665.20	39,196	13,488
In bottles ... do	878	1,354.00	614	975
White—				
In casks ... do	4,981	2,208.00	4,835	2,203
In bottles ... do	407	576.00	101	154
Champagne ... do	242	1,228.80	548	1,416
Absinthe ... do	4,048	4,617.60	5,187	5,919
Vermouth ... do	502	484.80	1,435	1,335
Gin ... do	90	76.80	609	317
Rum ... do	67	43.20	6,023	1,642
Whisky ... do	66	129.60	33	91
Beer ... do	1,867	1,574.40	6,586	3,730
Bitters ... do	140	240.00	361	586
Amer picon ... do	182	200.00	460	485
Liqueurs, assorted ... do	902	1,656.00	1,502	2,640
Cognac ... do	3,906	3,600.00	4,004	3,940
Other liquors ... do	925	1,228.80		1,512
Vinegar ... do	658	211.20	1,448	504
Mineral waters ... cases	11	91.20	125	595
Linseed oil ... gallons	3,014	1,622.40	5,285	3,168
Turpentine ... do	1,413	2,272.00	491	278
Oils		448.00		720
Sweet biscuits ... pounds	20,288	2,068.80		
Coal ... tons	2,637	8,390.40	1,620	4,747
Bricks		62.40		278
Cement ... pounds	44,000	206.40	168,951	1,003
Iron ... do	13,370	264.00	330,182	12,696
Timber		17,515.20		25,248
Hay ... pounds	4,818	48.00	27,689	269
Drugs		1,647.20		1,550
Paints ... pounds	65,084	4,070.40	90,287	5,544
Soap ... do	445,178	13,964.80	246,935	8,170
Perfumery		3,955.20		4,320
Tobacco and cigars		4,684.80		7,896
Matches ... gross	8,300	3,590.40	8,200	2,918
Calico ... yards	171,016	8,448.00	250,813	11,314
Parens ... do	200,667	9,073.60	249,301	16,853
Denims ... do	28,173	3,072.00	34,186	4,187
Silks		1,248.00		1,210
Muslins ... yards	103,090	5,851.20	82,074	6,082
Prints ... do	362,624	21,964.80	671,950	37,377
Other cloths		51,809.20		79,805
Ships' stores		10,099.20		14,318
Kerosene ... gallons	46,800	8,563.20	45,729	8,784
Other articles		125,000.00		128,707
Total		482,117.20		626,842

AMERICAN TRADE.

The custom-house has not published for the past two years the value of imports from each country; however, about one-half of the imports into the colony are of American origin.

Exports from Tahiti to the United States for the year ended December 31, 1892.

Articles.	Value.	Articles.	Value.
Bèche de mer	$515.50	Metal	$508.35
Cocoanuts	13,280.83	Miscellaneous	2,872.18
Copra	53,176.84	Natural history	7,100.00
Cotton	85,490.71	Pearl shell	241,525.53
Desiccated cocoanut	1,890.22	Vanilla	28,811.70
Fungus	903.86	Wool	4,889.32
Lime juice	2,105.10	Total	*443,680.14
Logs	610.00		

* Equal to $328,651.85 in United States gold currency at 35 per cent.

This is an increase over 1891 of $6,715. The condition of American trade is very good, and is steadily on the increase.

SHIPPING.

In 1892, 221 vessels, of 18,900 tons (17 vessels, of 5,081 tons, American) entered and 222 vessels, of 17,816 tons (16 vessels, of 4,721 tons, American) cleared at the port of Papeete.

AGRICULTURE.

During the past year but little improvement can be noticed in agricultural interests. A few coffee plantations have been started, and it is hoped that the planters will have the necessary financial aid to enable them to bring their plantations into bearing. Tahiti coffee is considered to be equal to the first grade grown elsewhere, and, as it grows wild, without any cultivation, and produces 5 pounds per tree yearly, it is believed that with a good system of cultivation the plant could be made to bear almost as much again, as in these islands it attains a greater size than anywhere else.

The cotton crop shows a decrease of 109,012 pounds as compared with the previous year. This decrease was caused by the prevailing discontent felt by nearly all planters at the low price paid for cotton this year; in fact, the prices paid at the Papeete market for this article fluctuate to such a degree that cotton has become a very uncertain crop to cultivate, and at the present moment nearly all of it is grown in small patches and cultivated almost entirely by the native planter. During the last quarter of the year cotton again enhanced slightly in value, which, no doubt, will cause certain native planters to increase the area of their plantations. Under favorable weather conditions the decrease reported this year should not occur in 1893.

The cocoanut trees have been better this year than at any time since 1889, when the trees experienced a severe blight. The price of nuts was $18 per thousand delivered alongside the mail vessels at Papeete; but, owing to the limited space reserved for cocoanuts in these vessels, there were 190,000 less nuts exported than last year. The cocoanut planter has a very poor outlook, unless there are more vessels put on the line. A cocoanut plantation, however, is always a good, paying investment, as the nuts can be converted into copra if no market is found for them in Papeete.

The orange crop was 722,000 less than last year, and it seems very certain that the orange will soon be a thing of the past if the groves of wild oranges are not thinned out somewhat, as the older bearing trees are choked by the undergrowth of young trees; and in some groves this exists to such an extent that the oranges are not collected, owing to the laborious task of bringing the fruit through the underbrush. The Tahiti orange is world renowned for its delicious flavor, and the natives have in hand something which, if shown a little care, would net them many thousands of dollars annually. No oranges have been exported to the United States since our new tariff went into effect. Formerly the United States consumed over half of the Tahiti orange crop, and this orange always commanded high prices in San Francisco, as they arrived during the months of July, August, September, and October, when the American crop was finished. The only market now convenient is Auckland, to which place the oranges are taken by a steamer (whose carrying capacity is about 700,000 oranges) which runs between that port and Tahiti monthly. As the duration of the crop lasts only five months, the greatest number exported is not more than 3,500,000.

Owing to the very low prices paid for vanilla beans this year, some native planters have neglected to inoculate their plantations, and in consequence next year's crop will be at least 2 or 3 tons less than that of 1892. This drop in Tahiti vanilla was caused by the great quantity of improperly cured beans which have been sent to San Francisco during the past few years. Natives have become very careless in the curing process, many of them sending their beans to market without having the water first extracted, and consequently when they arrive in San Francisco they are rotten. I would therefore caution all buyers in the United States carefully to examine all vanilla coming from Tahiti before purchasing, as the outside appearance of a bundle may be all right when the inside will contain perhaps twenty to thirty rotten beans.

CUSTOMS DUTIES.

Tariff levied on foreign goods imported into the French possessions of Oceania.

[1 meter = 1.094 yards; 1 hectoliter = 26.417 gallons; 1 liter = 2.113 pints; 1 kilogram = 2.205 pounds.]

Articles.	Unit.	Rate of duty.	
Timber of all kinds.		*Francs.*	*Per cent.*
Uncut pine, or sawn into scantling	Cubic meter	4.00	
Planed wood, one or both sides, grooved	do	5.00	
Cedar, walnut, or oak	do	8.00	
Woods of the islands	do	10.00	
Posts	Thousand	50.00	
Shingles (for roofs)	do	1.00	
Laths	Ad valorem		10
Firewood	Cubic meter	2.00	

Tariff levied on foreign goods imported into the French possessions of Oceania—Continued.

Articles.	Unit.	Rate of duty.	
		Francs.	*Per cent.*
Beverages.			
Red and white wine:			
In barrels	Hectoliter	17.50	
In cases	Case of 12 bottles or 24 half bottles.	10.00	
Sparkling wines	Case of 1 dozen	20.00	
Liqueurs, dry and sweet (Madeira, port, sherry), in barrels	Hectoliter	100.00	
Assorted sirups	Liter	.50	
Gin, whisky, old Tom, alcohol	do	2.00	
Brandy in cases or casks	do	1.50	
Rum	do	2.00	
Kirch and kummel in cases or casks	do	1.50	
Absinthe in cases or casks	do	2.00	
Vermouth	do	1.50	
Liquors (assorted) in cases	do	1.50	
Cassia	do	1.50	
Fruits preserved in spirits	do	.75	
Bitters	do	2.00	
Beer, porter, cider, etc	do	.25	
Mineral water	Bottle	.05	
Vinegar	Hectoliter	7.50	
Various articles.			
Starch	100 kilograms	20.00	
Opium	do	350.00	
Candles	do	30.00	
Beeswax	do	40.00	
Blacking (various)	Ad valorem		15
Sealing wax	100 kilograms	15.00	
Glue	do	7.00	
Blue, in ball or powder	do	20.00	
Inks of all colors	100 liters	15.00	
Emery powder	100 kilograms	7.00	
Grease for carriages or harness	do	7.00	
Putty	do	7.00	
Castor oil for industries	do	15.00	
Soap, ordinary	do	6.00	
Varnish	do	20.00	
Sweetmeats	do	15.00	
Chocolate, cocoa, and confectionery	do	20.00	
Cocoa, not prepared	do	20.00	
Dessert biscuits	do	15.00	
Saffron	do	400.00	
Medicines	Ad valorem		5
Vanilla	100 kilograms	208.00	
Patent medicines	Ad valorem		5
Tobacco	do		15
Cigars of all kinds	do		15
Cigarettes	do		15
Perfumery	do		15
Colors.			
Colors (oil, water, or in powder)	100 kilograms	7.00	
Ivory black	do	7.00	
Lampblack	do	7.00	
Ochers, various	do	5.00	
Black lead	do	7.00	
Red lead	do	7.00	

Tariff levied on foreign goods imported into the French possessions of Oceania—Continued.

Articles.	Unit.	Rate of duty.	
		Francs.	*Per cent.*
Colonial commodities.			
Sugar:			
Refined	100 kilograms	25.00	
Brown	do	25.00	
Spices	do	25.00	
Tea	Ad valorem		8
Coffee	do		8
Molasses	100 kilograms	25.00	
Olives, capers, mixed pickles, and mustard	Ad valorem		15
Farinaceous and preserved foods.			
Wheaten flour	100 kilograms	2.00	
Rice	do	2.00	
Arrowroot and yams	do	10.00	
Potatoes	do	.50	
Onions	do	2.00	
Vegetables:			
Various	do	3.00	
Compressed	Ad valorem		10
Tapioca	100 kilograms	10.00	
Pâtés	do	10.00	
Meal	do	10.00	
Ship's biscuits	do	3.00	
Pease:			
Petite pois au naturel	do	15.00	
Petite pois au blurre et au jambon	do	25.00	
French and other beans	do	15.00	
Mushrooms	do	15.00	
In oil	do	15.00	
Tomatoes and asparagus	do	15.00	
Truffles	do	400.00	
Chestnuts, roasted	do	15.00	
Soups:			
Julienne, bouillon, and potage militaire	do	15.00	
Tinned	do	15.00	
Sauces and artichokes	do	15.00	
Cauliflower and snails (à la bordelaise)	do	15.00	
Liebig extracts	do	50.00	
Fruits and seeds.			
Raisins and other dried fruits	100 kilograms	10.00	
Table fruits in juice	do	10.00	
Fruits and vegetables preserved in vinegar	do	10.00	
Cereals (seeds)	do	1.50	
Dried prunes	do	10.00	
Almonds and maize	do	15.00	
Filaments.			
Pulled cotton	100 kilograms	10.00	
Yarns and fabrics.			
Cotton material in pieces, prints, muslins, parens, cloths, flannel, merino, alpaca, cashmere, serge, billiard cloth, satin, velvet, grenadine, stockings, undershirts, shawls, ribbons, trimming lace, thread, all cloths, etc.	Ad valorem		13
Ship's stores.			
Water tanks	Ad valorem		5
Chains of all sizes	do		13
Boats	do		10
Blocks, wooden or iron	do		8
Oakum, hemp or flax	100 kilograms	10.00	
Felt	do	10.00	

Tariff levied on foreign goods imported into the French possessions of Oceania—Continued.

Articles.	Unit.	Rate of duty.	
		Francs.	*Per cent.*
Furniture.			
Furniture of all kinds (with the exception of iron beds, rattan armchairs and chairs).	Ad valorem		13
Chinese trunks	do		8
Metals.			
Unwrought metals (iron, steel, copper, zinc, lead, and tin) and unwrought iron for buildings.	100 kilograms	12.00	
Gold in bars, wire, or sheets	do	500.00	
Silver	do	35.00	
Platinum	do	575.00	
Wrought metal and ready for use	Ad valorem		13
Galvanized iron roofing	do		13
Salt provisions, preserves, etc.			
Tinned meats (beef, mutton, etc.), tongue, pigs' feet, ham, and sausage.	100 kilograms	8.00	
Salt meat, smoked and pickled	do	3.00	
Butter in barrels, tins, or bottles	do	10.00	
Lard and cheese	do	6.00	
Neat's-foot oil	do	13.00	
Preserved milk	do	8.00	
Tallow	do	2.00	
Hair and wool for mattresses	do	13.00	
Prepared skins (sheep, etc.)	do	20.00	
Hides	do	13.00	
Pâtés fins	do	20.00	
Pâtés militaires	do	10.00	
Tripe, ham, game, and fowl, in tins	do	15.00	
Preserved fish.			
Sardines	100 kilograms	13.00	
Salmon and codfish (tinned)	do	8.00	
Lobsters, oysters, mackerel, herrings, etc	do	10.00	
Smoked herrings	do	4.00	
Sponges:			
Common	do	13.00	
Fine	do	50.00	
Miscellaneous.			
Gelatin, ginger, and hops	100 kilograms	13.00	
Cork in bulk	do	25.00	
Corks	Thousand	1.50	
Charcoal	100 kilograms	2.00	
Slate for roofing	do	8.00	
Whiting	do	3.00	
Bricks	1,000 kilograms	5.00	
Fire bricks	do	15.00	
Paving stones	do	10.00	
Lime	do	5.00	
Cement	Barrels of 100 kilograms.	1.50	
Tar	100 kilograms	5.00	
Kerosene	30 kilograms	.85	
Grindstones	100 kilograms	5.00	
Whetstone and pumice stone	Ad valorem		13
Porcelain and pottery ware	do		13
Tiles	Thousand	5.00	
Sulphur	100 kilograms	5.00	
Dye	Ad valorem		13
Matches, wax and wood	Gross of boxes	2.00	
Powder	100 kilograms	15.00	
Dynamite	do	15.00	
Table salt	do	1.00	

Tariff levied on foreign goods imported into the French possessions of Oceania—Continued.

Articles.	Unit.	Rate of duty.	
		Francs.	*Per cent.*
Miscellaneous—Continued.			
Cardboard, account books, note paper, printing paper, wall paper, etc.	Ad valorem		8
Packing paper	100 kilograms	2.50	
Photographs, labels, envelopes, Venetian lanterns, cigarette paper, etc.	Ad valorem		8
Playing cards	do		13
Olive oil	Hectoliter	25.00	
Linseed oil and colza	100 kilograms	15.00	
Cocoanut oil	do	20.00	
Resin	do	2.00	
Turpentine	do	15.00	
Licorice	Ad valorem		15
Glass and crystal ware	do		15
Pencils of all kinds	Gross	1.00	
Basket work, ordinary and fine	Ad valorem		13
Material for saddlery	do		13
Sewing needles, sail and machine	do		8
Arms and ammunition	do		20
Jewelry of all kinds	do		13
Toys, games, pens, and penholders	do		13
Bands (sundry)	do		8
Brushes	do		13
Brooms	do		13
Hats of all kinds and shoes	do		13
Cutlery and safes	do		13
Carriages of all kinds, wagons, carts, handcarts, etc	do		20
Velocipedes and perambulators	do		13
False hair for ladies, etc	do		13
Rope of all sizes, manilla rope, fishline (hempen and cotton), sail thread, etc.	100 kilograms	10.00	
Smoothing irons	Ad valorem		8
Artificial flowers and gloves of all kinds	do		30
Hooks	do		8
Clocks and watches	do		15
Photographic instruments	do		8
Suspension and other lamps, musical instruments, drums, musical boxes, accordions, harmoniums, organs, pianos, and articles for repairing the above.	do		15
Instruments for weighing and measuring	do		8
Sewing machines, coffee and pepper mills, suction and force pumps, and agricultural tools.	do		8
Cartridges and ammunition	do		20
Umbrellas, parasols, and copying presses	do		10
Pipes of all kinds	do		15
Feathers (ostrich and other)	do		20
Hardware, tinware, ironmongery, nails, locks, India-rubber hose, wire gauge of brass, steel, iron, plaits of straw, etc.	do		10
All articles of wood, such as oars, cases, spades and handles, doors, blinds, windows, oak flooring, cartwrights' work, etc.	do		8
Works of art, pictures, paintings, statues, vases, china, Chinese matting, etc.	do		10
All other goods not enumerated in this tariff	do		8

The following articles are free of duty:

Provisions, stores, and articles for the government of the colony or municipalities.

Machine tools for wood and metal workers.

Tools in use brought by workmen about to establish in the colony.

Cattle, horses, sheep, goats, pigs, fowls, game birds, and all live birds.

Arms and munitions of war, clothing and accouterments for the use of the garrison.

Supplies intended for the use of schools.

Clothing and effects composing the wardrobe of travelers at the time of their arrival.

Furniture and movables in use belonging to military functionaries and officers landed at the time of their arrival in the colony.

Furniture and movables in use belonging to persons about to settle in the colony.

Diving dresses and apparatus, and all appliances for the culture and fishing of pearl oysters.

Fruit trees, plants, grain, and seeds.

Cotton, fungus, copra, cocoanuts, and all other island produce, with the exception of coffee.

Robes, etc., for members of the tribunals, military uniforms, arms and equipments for officers, and the uniforms and insignia of members of the civil service.

Registers and printed matter for the use of consuls.

Materials required for the building or refitting of ships, vessels, and boats, provided the importer declares to the government the use they are to be put to.

Receivers, sacks, cases, and materials necessary for packing the produce of the country when intended for exportation.

J. LAMB DOTY,
Consul.

TAHITI, *September 1, 1893.*

TRADE OF TUNSTALL.

This consular district was formed in 1869, and the following table shows the number of invoices certified each year:

Year.	Number.	Year.	Number.
1869	3,555	1883	4,028
1870	3,071	1884	3,174
1871	3,562	1885	3,151
1872	3,323	1886	3,914
1873	2,558	1887	4,288
1874	2,293	1888	4,216
1875	2,484	1889	4,653
1876	2,324	1890	4,866
1877	2,503	1891	5,232
1878	2,354	1892	5,710
1879	2,714	1893 (to September 30)	4,319
1880	3,315	Total	89,321
1881	3,574		
1882	4,140	Average	3,542

The lowest number reached was during the year 1874, while the year 1892 shows the greatest number of certifications. Still, the number of invoices certified is not a very safe criterion for estimating the quantity of goods shipped.

The records of this office are very incomplete from 1869 to 1872, and it is impossible to estimate the amount of the invoices certified during that period. The following table, however, shows the amount of the exports during each year, beginning with 1872:

Year.	Amount.	Year.	Amount.
1872	$4,195,531.41	1885	$2,809,685.56
1873	3,646,601.99	1886	3,136,018.95
1874	2,990,621.46	1887	3,445,178.61
1875	2,748,415.22	1888	3,821,073.25
1876	2,484,881.70	1889	3,755,869.02
1877	2,618,098.93	1890	3,916,123.71
1878	2,463,397.15	1891	3,854,053.63
1879	2,915,823.60	1892	3,891,652.62
1880	3,790,171.68	1893	4,023,497.22
1881	3,586,440.99		
1882	3,757,588.90	Total	74,455,734.04
1883	3,870,860.29	Average per annum	3,384,351.55
1884	2,734,507.95		

This table shows the value of the invoices of 1872 to be greater than those of any succeeding year, though the number of invoices certified falls 2,387 below that attained in 1892. The average value of each invoice was, in 1872, $1,262.57, and in 1892 it was $681.55. Had the value of each invoice in 1892 equaled that of 1872, the total amount would have been $7,209,174.70, or $3,417,522.08 in excess of that actually attained.

Previous to ten years ago goods were consigned from this district almost entirely to the seaboard towns of the United States, and by the importer there divided into small packages and transshipped to the interior. At the present time (and for a few years back) small consignments are sent directly to the interior towns, thus augmenting the number of invoices. The pieces shipped during the year 1892 were doubtless equal to, if not greater than, those of any previous year; yet, as before stated, the value fell far short of the amount reached in 1872. This is almost wholly due to the falling off in prices. For twenty years the pottery industry has joined the manufacturing army in the march of downward prices. New methods have supplanted the old. The laborious molding of clay by hand has given place to the machine called the "double jigger and jolly." New chemical processes, moreover, have brought forth a more perfect article. Hence the tables of the rich and poor are to-day supplied with delicate china, white granite, or plain printed ware more cheaply than at any previous time in the world's history. This benefit to the buyer has not been accompanied with less profit to the workman, for wages, measured by coin or the necessities of daily living, were never higher than in 1892.

North Staffordshire, in addition to being affected by the general wave of trade depression that has swept the civilized world, has been passing through the throes of a great coal strike that has involved nearly all the collieries of the United Kingdom, and, for lack of fuel, many pottery establishments have temporarily closed.

The combined effect upon the business done at this office is shown in the following comparison:

The six months ended June, 1892, show a total export value of $1,854,052.57, and a like period ended June, 1893, $2,272,099.06. During the quarter ended the 30th ultimo 1,220 invoices were certified, having a total value of $796,679.68, and in the corresponding quarter of 1892, 1,638 invoices were certified, having a total value of $1,108,682.98. Had the ratio of increase that marks the six months ended June, 1893, over that of the corresponding period of 1892 continued during the last quarter, the value of the exports would have reached, approximately, the sum of $1,363,680.06, but the actual figures show an approximate loss of $567,000.38. That the great falling off of trade in this district during the last quarter was not caused in any great degree by the coal strike, and that the result would have been practically the same had the potters not been short of fuel, a glance at the table showing the total amount of exports for twenty years will prove. From 1872 until the present time trade with the United States has followed closely the tides of prosperity, relaxation, and fiscal agitation that have ebbed and flowed in our country and the real causes of the falling off of the amount of goods shipped thence from this district during the quarter just ended must be sought for in the United States.

But, again, it may be necessary to enlarge one's circle of inquiries and take in the civilized world, for the spasmodic and unhealthy condition that marks the trade with the United States characterizes the trade from this district with all countries and with all places at home.

As usual during periods of depression, the laborer is the first to suffer; but the men engaged in pottery establishments, whether such works are closed or working on short time, have not exhibited any signs of peculiar distress. As far as I am able by careful investigation to discover, a better condition exists among them than among any other class of laborers in North Staffordshire.

WENDELL C. WARNER,
Consul.

TUNSTALL, *October 12, 1893.*

SEAL CATCH IN 1893 AND PROSPECTS FOR 1894.

Complete official statistics of the business of the British Columbia sealing fleet for 1893 are now presented in the following tables. Fifty-four vessels sailed from Victoria and two from Vancouver. All have returned to the home ports except the *Maud S.* and the *Warlock,* of Victoria. The *Maud S.* was ordered out of Bering Sea by a Russian cruiser on a charge of illegal sealing and sent to Yokohama for trial before the British consul. The *Warlock* is expected home in a week or two.

Name, tonnage, crews, etc., of each vessel.

Vessels.	Tonnage.	Whites.	Indians.	Boats.	Canoes.
Triumph	98	7	28	4	14
Sapphire	108	8	26	12	3
E. B. Marvin	117	27		8	
Mascot	40	7	14	2	7
Dora Liewerd	94	24		7	
Labrador	25	11		4	
Minnie	46	5	20	2	10
Annie E. Paint	82	23		8	
Mischief	45	6	20	2	10
Diana	50	19		6	
Venture	48	4	16	2	8
Mermaid	73	23		8	
Fawn	59	3	21	2	10
Walter A. Earle	68	23		6	
Beatrice, of Victoria	66	5	24	2	12
Ocean Belle	83	25		8	
Mountain Chief	22	1	19		9
Arietis	86	23		7	
Cape Beale	13		10		5
Kate	58	7	16	2	8
Favorite	80	7	26	3	13
Borealis	37	6	20	2	10
Ainoko	75	5	14	1	7
W. P. Sayward	64	5	16	1	8
Katharine	82	6	19	2	9
San José	31	4	16	2	8
Enterprise	69	24		7	
Agnes McDonald	107	25		7	
Victoria	63	6	20	2	10
Rosie Olsen	39	5	24	2	12
Wanderer	25	4	16	1	8
Viva	92	23		6	
May Belle	58	20		5	
Umbrina	98	24		7	
Penelope	70	20		6	
Vera	60	19		5	
Pioneer	66	6	23	1	11
Otto	86	8	24	2	12
Mary Taylor	42	18		5	
Brenda	100	26		8	
Libbie	93	23		7	
City of San Diego	46	14		5	
Geneva	92	26		8	
Casco	63	19		6	
Carlotta G. Cox	76	24		7	
Oscar and Hattie	81	24		7	
Teresa	63	20		6	
Sadie Turpel	56	24		7	
Maud S.	97	24		7	
Mary Ellen	63	23		7	
Walter L. Rich	76	24		7	
Annie C. Moore	113	26		8	
W. P. Hall	98	23		7	
Beatrice, of Vancouver	49				
C. D. Rand	52				
Total	3,744	806	432	256	204

Catch by each vessel of the British Columbia fleet and the place where the skins were taken.

Vessels.	British Columbia coast.	Japan coast.	Russian coast.	Total.
Triumph	1,713		623	2,336
Sapphire	1,262		341	1,603
E. B. Marvin	1,014		517	1,531
Mascot	857		327	1,184
Dora Liewerd	1,426		434	1,860
Labrador	263			263
Minnie	489		20	509
Annie E. Paint	740		401	1,141
Mischief	344			344
Diana	707		294	1,001
Venture	82			82
Mermaid		940	315	1,255
Fawn	806		77	883
Walter A. Earle	1,622			1,622
Beatrice, of Victoria	655			655
Ocean Belle	1,316		547	1,863
Mountain Chief	128			128
Arietis		920	464	1,384
Cape Beale	86			86
Kate	293			293
Favorite	949			949
Borealis	1,307			1,307
Ainoko	1,344		46	2,390
W. P. Sayward	596			596
Katharine	352		363	715
San José	242			242
Enterprise		1,027	274	1,301
Agnes McDonald		2,333	433	2,766
Victoria	420			420
Rosie Olsen	358			358
Wanderer	206			206
Viva		1,441	30	1,471
May Belle		1,852		1,852
Umbrina		1,827	625	2,452
Penelope		2,291		2,291
Vera		1,910	99	2,009
Pioneer	1,050			1,050
Otto	630		397	1,027
Mary Taylor	845		240	1,085
Brenda	845		408	1,253
Libbie		1,242	389	1,631
City of San Diego		942	101	1,043
Geneva		1,612	454	2,066
Casco		1,473	199	1,672
Carlotta G. Cox		2,396	376	2,772
Oscar and Hattie		1,178	1,020	2,198
Teresa		677	147	824
Sadie Turpel		927	475	1,402
Maud S		989		989
Mary Ellen		1,573	406	1,979
W. L. Rich	1,321		517	1,838
Annie C. Moore		822	333	1,155
W. P. Hall		735	263	998
Beatrice, of Vancouver	950			950
C. D. Rand	1,060			1,060
Indian canoe catch	2,035	66		2,101
Total	28,613	29,173	11,955	69,741

In addition, American schooners report catches as follows: *Mary Brown*, 800 at Yokohama and 80 in Victoria; *Allie I. Alger*, 2,221; *Henry Dennis*, 1,793; *Willard Ainsworth*, 1,000; *George R. White*, 400; *Columbia*, 300; and *Teaser* 300 at Seattle; total American here and at Seattle, 7,134, making a grand total of 76,875 skins for British Columbian and Puget Sound vessels.

These returns show the catch of the past season to be the largest ever made in a single year; and the sealers, happy in the thousands they have made, are making ready for a vigorous onslaught the coming season. Nearly all the Victoria schooners have been thoroughly repaired since coming into port, and an early departure for the hunting grounds will be made. Those going to the Russian and Japan side will get away before Christmas, and more than half the fleet will go there. The only element of uncertainty about that field of operation is the attitude which the Japanese Government may assume toward the British sealers. It is evidently disquieted by their presence, and is seeking a remedy. Nothing has been done as yet in the way of prohibition, however, and only enlarged efforts by home enterprise has been suggested. The Victoria sealers say: "Japan is our last haven, and if it is taken from us we will be obliged to submit to the narrow privileges of the British and American regulations, learn the use of the spear or the air gun, and make a closer study of the migratory habits of the game, so as to make the most of the open months."

Since the above was written I have received from the collector of customs at San Francisco the number of skins delivered there this season, as follows:

From twenty schooners	2,748
From the Pribyloff Islands	7,425
From Petropaulovski, by the Russian Sealskin Company	33,193
Total	43,366

These figures, added to those for Victoria and Seattle already given (76,875), bring the total of delivery at the three Pacific ports up to 120,241. Of the twenty schooners delivering cargoes at San Francisco, seventeen were from the Japan coast and three from the North Pacific. Of these latter, two report no catch at all and the other one 129 skins. Those from the Japan coast have delivered some 17,000 or 18,000 skins at Hakodate and Yokohama. The entire aggregate of skins taken, therefore, by San Francisco, Seattle, and Victoria schooners during the season of 1893 was about 140,000, of which 120,241 were delivered at the three ports named. These figures are official and reliable.

Nothing is said here about transferring the British fleet to some other flag, in order to avoid the restrictions on sealing imposed by the British and American governments, and I do not think such a movement is in contemplation.

LEVI W. MYERS,
Consul.

VICTORIA, *November 14, 1893.*

IMPORTS AND EXPORTS OF AUSTRIA-HUNGARY.

The trade for the eight months ended August 30 was:

Year.	Imports.	Exports.	Excess of exports.
	*Florins.**	*Florins.**	*Florins.**
1893	439,000,000	507,000,000	68,000,000
1892	414,000,000	456,000,000	42,000,000
Increase	25,000,000	51,000,000	26,000,000

* 1 florin=39 cents.

The largest gain in Austrian imports was on cheap Italian wines. The recent commercial treaty concluded between Italy and Austria-Hungary enabled the former to export to Austria wines amounting in value to 7,500,000 florins for the first eight months of this year.

Though a considerable decrease has taken place in the exportation of flour, wheat, rye, and maize, the shortage in values has been more than made good by the steady increase in beet-root sugar, of which there was shipped to the United States alone for the first three quarters of 1893, $2,209,062; of 1892, $1,628,234; resulting in an increase of $580,828 for the past nine months as compared with the same period in 1892.

The manufacture of all kinds of cotton goods, the spinning of yarns, etc., are in a very healthful and prosperous condition. There were imported into Austria from January 1 until August 30, inclusive, this year, 800,000 metric centners* of cotton (about 400,000 bales).

The import and export of gold and silver during the same period was as follows:

Description.	Imports.	Exports.	Excess of imports.
Gold:	*Kilograms.**	*Kilograms.**	*Kilograms.**
Bars	47.817		
Old gold and coins	52.224		
Total	100.041	6.755	93.286
Silver in bars and coin	80.910	65.09	15.82

* 1 kilogram=2.205 pounds.

MAX JUDD,
Consul-General.

VIENNA, *October 21, 1893.*

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* 1 metric centner=222 pounds.

FOREIGN WORKMEN IN FRANCE.

For a number of years there has been a strong undercurrent of feeling among the workingmen of France upon the subject of the employment of resident foreigners, and recent events have done much to draw this feeling to the surface.

The deplorable *émeute* at Aigues-Mortes, on the 17th of last August, which resulted in the death of ten Italian and five French laborers, was an indication, among many others, of how deep seated is the conviction in the minds of certain classes of the working population of France that their welfare is jeopardized by the competition of the foreign element in their midst.

How far this belief is justified (if at all) by the facts is a matter about which thoughtful Frenchmen in and out of public life differ widely in opinion. It is urged on the one side that France, both from internal and external conditions, is especially open to the danger of an excess of immigration. Rich in material wealth, but with a population far from dense—there being about 71 inhabitants to the square kilometer—the law of supply and demand has given to her workingmen a remuneration much exceeding that which is paid in similar employments in Belgium, Germany, Italy, and Spain. This law of supply and demand, so far as it relates to wages, is materially affected, say the opponents of immigration, by the condition of a nation both in regard to its wealth and the density of its population. For example, France, with only 71 inhabitants to the square kilometer, may be classed among the rich nations of the world, while Italy, which is relatively poor, has 100 inhabitants to the square kilometer. Belgium is rich and populous (200 to the square kilometer). Germany occupies an intermediate position in these respects between France and Italy, while Spain, although not overpopulated, has little capital and gives her workmen but moderate wages. The conclusion sought to be deduced is obvious. France, whose wealth enables her to give, and whose relative thinness of population enables her workmen to demand, a high rate of wages, holds out a constant invitation and inducement to the workmen of that semicircle of neighboring lands to enter in and compete with her own sons.

On the other hand, it is contended that in no way is the prosperity of the native workmen imperiled by the presence of the stranger; that the argument resting upon the comparative density of population and wealth of nations, while based upon truth, has no application under the present condition of affairs in France; that even in the case of the employment of foreigners by contractors in the various industries—the most serious feature, perhaps, of the situation—there is no menace to the real interests of the Frenchman, because in nearly every instance the work has been of that kind in which the native laborer is strongly averse to engaging, such as the manufacture of oil and soap and the building of railroads, earthworks, etc.

It would be useless, and indeed out of place, to attempt to decide upon the arguments advanced on either side. Whether the greater amount of truth is with the one or the other, the fact remains that there is to-day a constantly increasing feeling of unrest among the workingmen of France, and the agitation of this question has reached a stage that enforces the attention of the political student and the legislator.

RECENT LEGISLATION ON THE SUBJECT.

In 1892 an attempt was made in the Chamber of Deputies to pass a bill providing for the imposition of a tax on all foreign workmen, but, although an elaborate report was drawn up on the subject, the bill failed to reach a vote. On the 4th of May of the present year a much more moderate bill was introduced, providing for the registration of all persons coming to reside in France with the intention of pursuing a profession, trade, or industry.

By many deputies this was considered as only a half measure, and a lively discussion took place between members of all parties represented in the Chamber. Some proposed a tax of 1 per cent on the salaries of foreign workmen, while others demanded a tax on every employer who engaged foreign labor. One deputy asserted that foreign laborers deprived the country of 160,000,000 francs annually; another said that if the foreign element continued to increase in its present proportions the French nation would consist, in a few years, almost entirely of imported foreigners. The Minister of Foreign Affairs, in a sensible speech, endeavored to moderate the tone of the discussion by saying that such was the extent of the depopulation of certain districts in France that the harvest would be left to rot on the ground if the help of foreign labor were refused to the cultivators; that in any case the bill proposed was but a simple police measure and did not require much comment. He was followed by a deputy who reminded his colleagues of the independent spirit which characterized the English and Americans, who, in his opinion, constituted the best part of the foreign colony in France. If any considerable number of these were fined for forgetting or neglecting to make the declaration called for by the bill before them, they would in a short time abandon the country, a result greatly to be deplored and seriously detrimental to the commercial interests of France.

The bill was finally passed without change and sent to the Senate, where it was voted on on the 5th of July, and on the 8th of August became law.

The following is the substance of the new law:

By article 1 of the act it is provided that every foreigner not admitted to domicile—*non admis à domicile* (a proceeding somewhat analogous to the preliminary declaration under the naturalization laws of the United States)—arriving in a commune for the purpose of pursuing any profession, trade, or industry shall make a declaration before the mayor of his intended residence and produce sufficient proof of his identity within eight days after his arrival. A special registry is to be kept, in which is to be entered a description of the person registered, with his age, civil status, and profession. An abstract of this registry is delivered to the declarant. This abstract is subject to a stamp tax of 35 cents (1.80 francs) and a nominal fee of 6 cents in towns of 50,000 inhabitants and under, and 10 cents in towns of over 50,000 inhabitants. In case of change of commune, the foreigner must present his certificate of registration, within two days after his arrival, to the mayor of his new residence.

Under the provisions of article 2 any person who knowingly employs a foreigner who is not furnished with the certificate of registration is subject to a police penalty (*peines de simple police*).

Under article 3 a neglect to make the declaration within the prescribed time, or a refusal to produce the certificate when required, subjects the offender to a fine of from 50 to 200 francs ($9.65 to $38.60). A deliberately false declaration will expose the declarant to a fine of from 100 to 300 francs ($19.30 to $57.90), and in certain cases to temporary or permanent expulsion from French territory. A foreigner thus expelled who shall reënter French territory without permission of the Government will be imprisoned for a term of from one to six months, and after the expiration of his term of imprisonment will be reconducted to the frontier.

Article 4 relates to the disposition of the fines, and article 5 and last gives to foreigners actually resident in France a period of one month from the passage of the act to conform to the provisions of the law.

STATISTICS.

As germane to this subject, it may be of interest to take a glance at the number of foreigners in France and the professions to which the majority belong, with more special attention to the working classes.

There can be no accurate estimate of the number of foreigners living in France prior to the middle of the present century, as it was in the census of 1851 that the nationality of the inhabitants of France was, for the first time, registered. At that period 380,000 foreigners of every nation were reckoned, out of a total population of 35,783,000. Fifteen years later (1866) the foreign element was found to have increased to 655,000. In 1881 the figure stood at 1,126,500, and in the last census (1891) 1,130,211 foreigners were returned, representing nearly 3 per cent of the entire population.

The following table gives the result of the census from the year 1851 to 1891:

Years.	French.	Naturalized.	Foreigners.
1851	35,388,814	13,525	379,289
1861	36,864,673	15,259	506,381
1866	37,415,283	16,286	655,036
1872	35,346,695	15,303	740,668
1876	36,069,524	34,510	801,754
1881	36,327,154	77,046	1,001,090
1886	36,700,342	103,886	1,126,531
1891	36,832,470	170,704	1,130,211

This table shows that, in round numbers, the population of France increased by 2,350,000 individuals in the last forty years, but of this total 900,000 were foreigners. The departments containing the largest foreign element are Nord, Seine, Bouches du Rhône, Alpes-Maritimes, Ardennes, Meurth et Moselle, and Pas de Calais. The department containing the fewest foreigners is that of the Lozère (112).

The principal nationalities are represented as follows:

Nationality.	Number.	Nationality.	Number.
Belgians	465,860	English	39,687
Italians	286,042	Russians	14,357
Germans	83,333	Austrians and Hungarians	11,909
Swiss	83,117	North Americans	7,024
Spaniards	77,736	South Americans	4,826

The English have doubled within the last forty years, while the Spaniards have nearly trebled, and the same may be said of the Swiss and the Belgians. The Italians have increased fourfold.

Percentage of total foreign population according to origin.

Nationality.	Per cent.	Nationality.	Per cent.
Belgians	41.2	English	3.5
Italians	25.3	Russians	1.26
Swiss	7.4	Austrians	1.05
Germans	7.3	Americans (North and South)	1.05
Spanirds	6.9	Other nationalities	1.44
Dutch and Luxemburgers	3.6		

As has been seen, the total number of foreigners in France, according to the last census, was 1,130,211, or nearly 3 per cent of the entire population. Of this number 339,283 are working people of both sexes and 51,786 are domestic servants.

The following table gives the increase or decrease according to each nationality during the five years ending 1891:

Nationality.	Increase.	Decrease.
English	3,553	
Americans (North and South)	1,599	
Germans		16,781
Austrians and Hungarians	92	
Belgians		16,401
Dutch	3,177	
Italians	21,474	
Spaniards		1,814
Swiss	4,533	
Russians	2,377	

It is unfortunate that prior to 1891 the census reports did not distinguish between the natives of North and South America.

The following table suggests an interesting comparison between the number of strangers of each nationality living in France and the number of Frenchmen residing in the corresponding countries:

Country.	Foreigners in France.	French abroad.
England	39,687	26,600
Germany	83,333	24,200
Austria	11,909	3,100
Belgium	465,860	52,000
Netherlands	9,078	1,400
Duchy of Luxemburg	31,248	1,392
Italy	286,042	11,000
Spain	77,736	18,000
Portugal	1,331	346
Switzerland	83,117	54,000
Russia	14,357	5,000
Greece	2,035	1,000
Africa (besides Algeria)	813	60,000
Asia	343	15,000
North America	7,024	130,000
South America	4,828	101,000
Australia	....	4,400

CHARLES W. WHILEY, Jr.,
Consul.

St. Etienne, *October 5, 1893.*

NOVA SCOTIA COAL.

In compliance with the request of the Department, I inclose a statement covering the cost of mining coal in Nova Scotia and of shipping it to the United States, prepared by Mr. M. R. Morrow, of Halifax, who is considered the highest authority:

Cape Breton coal, at mines' ports, which are all within 25 miles of the respective mines—

	Per ton.
Screened	$2.00
Run of mine	1.80
Slack	1.10

These are subject to a discount of 5 cents per ton for 1,000 tons and over, 10 cents per ton for 5,000 tons and over, and 15 cents per ton for 10,000 tons and over.

Pictou coal, shipped at Pictou, about 15 miles from the mines—

	Per ton.
Screened Acadia	$2.50
Run-of-mine Acadia	2.25
Slack Acadia	1.50
Culm	.80
Screened Drummond	2.25
Run-of-mine Drummond	2.00
Slack Drummond	1.50
Culm Drummond	.80

Pictou is closed to navigation for five months of the year, when the coal must be shipped from Halifax, 100 miles distant, at an additional cost over Pictou of 80 cents per ton.

Spring Hill coal, at Parrsboro', 27 miles distant from the mines—

	Per ton.
Screened	$2.75
Run of mine	2.50
Slack	1.40
Culm	1.00

The estimated cost in 1893 of mining and shipping the various coals of the province, free on board vessels at the mines' ports, for run-of-mine coal was:

	Per ton.
Cape Breton coal	$1.40
Pictou coal:	
Acadia mine	2.00
Drummond mine	1.85
Spring Hill coal	2.15

Prices paid miners at Cape Breton mines were as follows:

	Per ton.
Gowrie	$0.46
Little Glace Bay	.42
International	.44
Old Bridgeport	.44
Reserve	.42
Emery	.43
Gardener	.55

Coal freights from Nova Scotia to New England during the last five years averaged $1.90 per ton on the small quantity sent there, which was mostly in sailing vessels.

The above prices and rates are for the ton of 2,240 pounds.

DARIUS H. INGRAHAM,
Consul-General.

HALIFAX, *January 4, 1894.*

AMERICAN TRADE IN ECUADOR.

The advisable course to pursue in order to foster a trade with these countries (Guayaquil being the commercial metropolis for a vast extent of territory) would be to send hither competent men who speak Spanish to study the necessities of the trade and report to their employers. One man at first might represent several branches of trade. The Government can never build up a trade with these countries. Our countrymen formerly had an instinct for foreign trade; they must cultivate it anew.

There is a great field here for our simplest agricultural implements—plows, hoes, etc. The machete is the agricultural implement used here.

If a live man were sent here with plows, hoes, and other simple implements of agriculture, prepared to go on the haciendas and show the people how to use them, and the immense gain in using them, I do not think the result would be doubtful.

I have never seen corn meal in Ecuador; it is unknown, at least in the vicinity of Guayaquil, and yet large quantities of corn are produced. Corn mills might be introduced, with little expense, into the corn-producing regions, such as that of the rich lands on the Boliche River, where I ate several meals at a great hacienda where there was not seen a crumb of bread except what our party carried along. Yet on this place were hundreds of bushels of very fine corn. *Yuca* is used instead of bread. It is a great root, somewhat like the sweet potato of our Southern States, but not so good.

I make these observations to indicate what might be accomplished by a little enterprise properly directed.

GEO. G. DILLARD,
Consul-General.

GUAYAQUIL, *November 4, 1893.*

INCOME TAX OF SAXONY.

In Saxony incomes of less than $71.40 (300 marks) are not taxed; in Prussia the incomes exempt are all those under $214.20 (900 marks). An effort is being made to induce the Saxon government to remove the tax on the five lowest sums, *i. e.*, to begin taxing at $190.40 (800 marks) rather than, as now, at $71.40 (300 marks). The amount paid by persons taxed on these amounts is very small—11.9 cents on $71.40, 23.8 cents on $119, and 47.6 cents on incomes between $119 and $142.80. If the tax is taken off the three lowest sums, 43 per cent of all those taxed, or nearly 650,000 persons, will be affected. The three lowest are mentioned because up to that point (from $71.40 to $119, inclusive) the question is economic only; at $142.80 it begins to be political, for persons paying taxes on $142.80, or 71 cents per annum, are active elements in city life, inasmuch as they vote, purchasing, as it were, that privilege by the 71-cent tax. On political grounds, therefore, the tax will hardly be taken off above the $119 (500 marks) line. If the three lowest classes are dropped, the loss to the State is estimated at $166,600—a trifle over 3 per cent of the total of income taxes—an insignificant sum. Take the tax off the five lowest sums in the schedule ($71.40 to $166.60, inclusive), and 66 per cent of all those taxed are affected, or 950,000 persons. The loss to the State would be barely 7½ per cent of the total tax raised on incomes, or $357,000. The political significance of such changes, I may say in passing, may be judged of when it is known that most of the socialists come under the four or five lowest sums taxed.

The Conservatives have come forward with another—possibly more popular—proposition. It is this: Leave the rates, high and low, as they are, but take the tax off the middle classes. The projectors are not precise. They do not say just where to begin or where to stop; hence it is impossible to calculate governmental losses. It is easy, however, to see that the tax presses very heavily on the middle classes. It is no task to save enough to pay a 75-cent or $1 tax, but with a $5, $6, or $10 one it is different. Teachers, small tradesmen, and mechanics pay these latter sums, and these people are the backbone of the nation. Incomes between 3,298 marks ($785), paying a tax of $18, and 6,301 marks ($1,499.64), paying $44.98, suffer a great deal. Here the tax jumps from $18 to $22.37, to $27.13, to $32.36, to $38.56, to $44.98. The incomes of this (the middle) class—from $190.20 to $856.80 per annum—yielded a total tax of $1,547,000, and those between $785.40 and $2,284.80 yielded $1,190,000. Reasonably reduce the rates in these classes, losing only one million, relieving those who suffer most, and dropping the three lowest classes, and the total loss to the State would be between $238,000 and $416,500.

It is proposed to cover these losses by increased rates on incomes above 9,600 marks ($2,284.80). Last year the total taxes on incomes above this amount yielded $1,785,000—at least 36 per cent of the total tax receipts. The tax on these was only 3 per cent, the same as on $1,285.20 and upwards. Tax these incomes 4 or even 4½ per cent—not a severe rate on people able to pay—and the losses indicated above are covered. The proposers of this scheme warn against pushing the progressive tax rate too high; 4 or 4½ per cent is regarded as reasonable and safe. Coming, as it does, from friends of the Conservative classes, it promises to be acceptable. It is feared that screwing the rates too high will drive capital into other countries. "If," say the friends of the reform, "Saxony adopts a system analogous to Prussia's, politicians must let up on an imperial income tax." "Bavaria," says that Kingdom's Finance Minister, "will never favor such an imperial tax." Other kingdoms and states stand behind Bavaria in this declaration. With an income tax in each kingdom, duchy, and principality based on Prussia's system or that contemplated by Saxony an imperial income tax would bear oppressively. It is hardly probable that such a tax can ever be collected, although it finds great favor among some economists. The annual deficit of $25,000,000 must be made up in some other way. To pile up an imperial income tax on top of the royal or ducal income taxes would raise such a storm of indignation as Germany has seldom, if ever, experienced.

THE PRESENT SYSTEM.

The details of the present system are interesting. They commend themselves to countries contemplating income taxes.

The system is so regulated that people of small means pay only from one-half of one to one per cent of their incomes, while the rich pay never more than 3 per cent. In Prussia the tax begins at incomes of 900 marks ($214.20), with one-half of one per cent, and runs as high as 4 per cent; in Saxony it begins at 300 marks ($71.40), with one-half of one per cent and runs up to

3 per cent. In Saxony an income of $119 pays a yearly tax of 23.8 cents—one-fifth of one per cent. In other words, a person with an annual income of $119 pays to the State one cent out of every $5 regularly received as income. A person with $476 income—four times the above—pays $7.14 per annum. Thus it will be seen that the latter, with an income only four times as large as the former, pays a tax thirty times as large. Double the income again, make it $952—twice $476—and the tax is not twice $7.14, but $22.37, more than thrice $7.14. Double again and we get an income of $1,904, with tax again more than double ($57.41). All incomes above $1,713.60 pay 3 per cent tax. We see that persons with $119 incomes pay one cent out of every $5, while those with incomes above $1,713.60 pay 15 cents out of every $5. The claim, therefore, that the working classes pay the direct taxes is met with the above facts based on figures. The tax when promulgated was adjusted with a view to making people with large incomes pay large amounts. Thus far, in spite of the two reform movements mentioned above, it has worked very successfully and has in the main yielded safe and certain results, with little loss and less complaint. Why the percentages stopped at 3 per cent and did not go on in the ratios running between the tax on $71.40 and $1,713.60 is nowhere stated. I presume it was because of the fear indicated above that capital might be frightened out of the country. There are incomes as high as $10,000, $20,000, $25,000, $50,000, and $100,000; yet these, both here and in Prussia, are taxed no higher than 3 and 4 per cent.

PERSONS TAXED.

The total number of persons taxed (on incomes) last year in Saxony was 1,398,686. The aggregate of their incomes was estimated at $343,900,983. The revenue was $4,565,711.

Of the whole number of persons taxed, 266,154, or 19 per cent, had incomes under $95.20. The total income of this 19 per cent was $20,230,000, about 5½ per cent of the total amount taxed, but the receipts therefrom—$63,344—were less than one-half of one per cent of the total receipts.

The number of persons taxed in the classes from $71.40 to $190.40 was almost 950,000, or 67½ per cent of the 1,398,686. Their incomes (total) were put at $113,050,000, almost 33 per cent of the total taxed; but the total revenue taken in on this sum by the royal taxgatherers was only $357,000, or less than 8 per cent of the total of $4,565,711 collected. As if to justify the claim made by the Conservatives, persons of moderate means—those with incomes between $190.40 and $785.40—of whom there were 408,092, with a total rated income of 506,000,000 marks ($120,428,000), paid upwards of $2,618,000, more than 60 per cent of the total amount collected, although they did not number 30 per cent of those taxed.

DEFINITION OF INCOME.

Everything that comes yearly on the credit side of a man's account is taxed. If a man owns a house and lives in it, he is taxed on the rent he would pay, *i. e.*, a fair amount is regarded as rent and consequently as part of his revenue; so also products of his own labor used in his own family. This is as true of farmers as of manufacturers, though perhaps not so easy to distinguish or determine. Of course, each is allowed to deduct interest on debts (mortgages, etc.), insurance, and repairs.

SOURCES OF REVENUE FROM INCOME TAX.

The principal sources for income-taxing are:

(1) Leased lands, houses (whether let for rent or used as one's own dwelling), the working of one's own farm or forest.

(2) Interest on capital, rents, appanages, dividends from stocks, bonds, mining shares, etc.; inheritances, etc.

(3) Salaries of all kinds, whether in office or business; also pensions, money paid for nursing, and money paid while waiting for a place.

(4) Moneys made in commerce, trade, manufacturing, and farming on other farms than on one's own.

In short, money made in any legal way is taxed, and any attempt to avoid taxation or to deceive is always severely punished. It is permissible at law to compel a person found guilty of falsely declaring his income to pay ten times the amount assessed. Cases of this kind seldom come into court.

J. C. MONAGHAN,
CHEMNITZ, *November 8, 1893.* *Consul.*

AMERICAN CARPETS IN ENGLAND.

Several months since Messrs. Sloane, the American carpet manufacturers, exported to Great Britain some 40,000 rolls of carpet, which were offered at prices considerably lower than corresponding grades of English and Scotch carpets. There was much commotion among the manufacturers. As a result of this competition from an unexpected quarter, a general reduction followed in the price of Axminsters and the other finer grades. In this city prices dropped 10 to 20 per cent, and a further very large reduction is in contemplation. I am informed on good authority, which information prompts the writing of this report, that the English and Scotch makers are now manufacturing special grades of Axminsters that are intended to compete with the importations from the United States. The reduction in these new grades will be 40 to 50 per cent from former prices. These carpets they expect to have on the market inside of a month.

My observation is that the prejudice against American products is assiduously cultivated in the minds of the consumers by many dealers; consequently, unless the American carpet is much superior in quality and more attractive in design, prices being equal, the British product will be pushed and the American product discounted by all kinds of methods.

In view of this situation, it behooves American manufacturers to take every precaution to guard against the energetic influence of hostile dealers.

JAMES B. TANEY,
BELFAST, *November 8, 1893.* *Consul.*

COAL-MINING IN SAXONY.

Next to its manufactures, Saxony is celebrated for its mining industries. Its mountains are mineral hills. One of the most famous mine schools, that of Freiburg, is situated halfway between Dresden, the capital, and Chemnitz, the chief manufacturing city. The following table tells the story of mining in the Chemnitz district during the last nine years:

Year.	Quantity.	Value.
	Tons.	
1884	1,075,647	$1,764,349
1885	1,087,636	1,972,382
1886	1,199,239	2,203,662
1887	1,211,194	2,492,684
1888	1,297,055	2,662,622
1889	1,257,719	2,804,224
1890	1,300,927	3,144,257
1891	1,430,285	3,506,474
1892	1,356,486	3,202,899

There were 162 steam engines, with 7,848-horse power, running in 1892. There were 59 water-supply pumps, 11 injectors, 21 steam elevators, 15 pulsometers, 11 large ventilators, 26 air compressors, and 13 racking machines in active operation.

WAGES.

Of technicians there were 143; of those in mercantile departments, 66; of those combining both technical and mercantile branches, 6; total, 215. These received salaries amounting to $120,508, averaging $560.50. There were 5,939 miners and 1,776 day laborers, of whom 138 were women. The average wages for workingmen were $203.49 per annum.

The average product of a workman was: In 1891, 186.8 tons of 2,204 pounds; in 1892, 175.8 tons.

The cost of producing one hectoliter (3.5317 cubic feet) of coal was as follows: For labor, 37.67 pfennigs;* material, 10.41 pfennigs; miscellaneous, 3.3 pfennigs; superintending, 3.37 pfennigs; accident insurance, 0.78 pfennig; sick fund, 0.49 pfennig; pension fund, 1.09 pfennigs; interest, 2.58 pfennigs; coal used, 4.13 pfennigs; total, 63.82 pfennigs (about 15 cents).

The number of persons employed in mining in Saxony was:

Year.	Total number.	Children.	Youths.	Women.
1889	29,450	417	766	742
1890	29,704	407	729	791
1891	31,071	517	666	740
1892	30,903	184	819	633

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* 1 pfennig=$0.00238; 1 mark=$0 238.

The average wages per person per annum for mining brown coal was: In 1888, $133.29; 1889, $133.46; 1890, $139.49; 1891, $134.55; 1892, $147.80. Near Chemnitz the pay was: In 1891, $167.81; 1892, $171.44. Near Dresden it was: In 1891, $145.18; 1892, $135.18. The average wages of adults in hard-coal (stone coal, so called) mines was:

Districts.	1889.	1890.	1891.	1892.
Chemnitz	$211.50	$220.00	$218.05	$203.49
Dresden	222.76	238.80	251.46	261.00
Zwickau	236.50	245.50	244.00	230.50

The average for men was:

Districts.	1890.	1891.	1892.
Chemnitz	....	$225.25	$209.35
Dresden	$261.00	257.40	....
Zwickau	250.08	234.56	....

The reduction was due to dull trade in other branches of business. Many of the mines were run at a loss.

PRODUCTION.

Amount of coal handled in the Empire, inclusive of Luxemburg.

HARD (STONE) COAL.

Year.	Production.	Imported.	Exported.	Used in Empire.	Used per capita of population.
	*Tons.**	*Tons.**	*Tons.**	*Tons.**	*Pounds.*
1882	52,118,595	2,090,622	7,631,617	46,577,600	2,272.94
1883	55,943,004	2,181,182	8,705,000	49,419,186	2,396.4
1884	57,233,875	2,296,777	8,816,935	50,713,717	2,440.49
1885	58,320,398	2,375,905	8,955,629	51,740,674	2,471.36
1886	58,056,598	2,560,291	8,655,240	51,961,649	2,460.33
1887	60,333,984	2,674,739	8,781,377	54,227,346	2,541.9
1888	65,386,120	3,252,409	9,460,258	59,178,271	2,733.7
1889	67,342,171	4,556,559	8,847,202	63,051,528	2,841.72
1890	70,237,808	4,164,538	9,145,187	65,257,159	2,910.07
1891	73,715,653	5,032,826	9,536,374	69,212,105	3,053.37

BROWN, OR SOFT, COAL.

1882	13,259,616	3,020,984	35,135	16,245,465	793.66
1883	14,499,644	3,319,944	45,789	17,773,799	862
1884	14,879,945	3,466,322	59,348	18,286,919	879.64
1885	15,355,117	3,647,777	14,122	18,988,772	906.09
1886	15,625,986	4,084,930	15,856	19,695,060	932.55
1887	15,898,634	4,424,227	16,443	20,306,518	952.39
1888	16,573,963	5,211,668	17,239	21,768,392	1,005.3
1889	17,631,059	5,650,300	14,170	23,267,189	1,049.39
1890	19,053,026	6,506,404	18,581	25,540,849	1,139.78
1891	20,536,625	6,805,586	17,285	27,324,926	1,205.92

* Tons of 2,204 pounds.

General table for Empire, inclusive of Luxemburg.

HARD COAL.

Year.	No. of mines working.		Having other business also.	Average gang or shift.	Production.	
	Without production.	With production.			Quantity.	Value.
					*Tons.**	
1884	26	441	2	214,728	57,233,900	$71,109,640
1885	17	452	1	218,725	58,320,400	72,100,196
1886	14	436	2	217,581	58,056,600	71,573,264
1887	12	419	2	217,357	60,334,000	74,036,326
1888	13	409	....	225,452	65,386,100	81,172,994
1889	12	394	....	239,954	67,342,200	91,649,040
1890	17	408	....	262,475	70,237,800	128,054,472
1891	23	401	....	283,227	73,715,700	140,305,284

SOFT COAL.

Year.	Without production.	With production.	Having other business also.	Average gang or shift.	Quantity.	Value.
1884	21	639	1	27,442	14,880,000	9,419,564
1885	12	633	....	28,186	15,355,100	9,609,964
1886	13	625	....	29,668	15,626,000	9,572,836
1887	14	611	....	29,408	15,898,600	9,567,838
1888	18	605	....	29,630	16,574,000	9,733,248
1889	15	605	....	31,140	17,631,000	10,555,062
1890	24	604	....	33,161	19,053,000	11,845,022
1891	27	600	....	35,682	20,536,600	12,891,508

* Tons of 2,204 pounds.

A part of the tale is told in the facts and figures given above. "How is it possible for people to live on such wages" is the question which naturally arises. Rents are not only reasonable among the mountains, but are nominally nothing. Rude houses they are, to be sure; humble, but seldom or never unhappy. Their bread is rich in rye, and better baked than with us. Potatoes are much cheaper than in America. Clothes of all kinds and boots and shoes are less than half in price—ofttimes one-fourth—what they are with us. They are rougher and clumsier, no doubt, but all the better adapted to the work of mines and fields.

It seems incredible that things can be sold so cheaply as one sees them sold here. It is a mistaken idea that the wages quoted are those of starvation. It is true that the peasantry eat very little meat; but accurate acquaintance with the inner life of Germans reveals the fact that many of the people are vegetarians, not at all from necessity, but from belief, while every doctor that I have heard speak at the unions for natural healing disapproves of eating too much meat.

From careful personal observation and inquiry I learn that the rich and official class live dear, the poor cheap; the luxuries of life come high, the necessaries low. This fact is found even in the matter of taxes. These are regulated to meet the incomes, the poor paying 12 cents on $71.40 and 24 cents on $119, while incomes above $1,730 pay 3 per cent on the income, or $51.90.

GENERAL VIEW OF WAGES IN THE EMPIRE.

I have given the wage rates for coal-mining in the Chemnitz district. The wages paid other miners per capita in Saxony were: In 1888, $146.53; 1889, $150.49; 1890, $157.12; 1891, $161.78; 1892, $161.87. Each male miner in 1891 received $175.22; in 1892, $171.55. The men's wages in other districts were as follows:

Mines or district.	1892.	1891.
Altenburg	$111.64	$131.38
Marienberg	144.90	163.46
Freiburg	177.80	....
Scheibenberg	137.54	....
Johangeorgenstadt	113.57	....
Schneeberg	166.38	....

The tale told by these tables is that in so small a state as Saxony, with its 5,776 square miles—a trifle larger than Connecticut (4,750 square miles) and smaller than Massachusetts (7,800 square miles)—the wages vary from $111.64 in Altenburg to $177.80 in Freiburg, two towns 20 or 25 miles apart.

PRICES OF LABOR IN PRUSSIA AND ITS PROVINCES.

The total number employed in mining was 363,796—6,358 more than in 1891. This is 7.75 per cent more than the year before. In 1891 the increase over 1890 was 5.59 per cent, and in 1890 over 1889 it was 7.75 per cent.

The average wages of stone-coal miners in Upper Silesia was last year $159.22, against $164.93 in 1891.

District.	1892.	1891.
Lower Silesia	$177.78	$180.64
Dartmund	232.29	257.04
Saarbrucken state mines	248.00	270.61
Aix la Chapelle mines	205.87	225.62
Halle (copper slate mines)	212.30	217.29
Liegen-Nassau	152.80	154.22
Mines on right side of Rhine	153.51	154.46
Mines on left side of Rhine	152.08	152.80
State mines, Upper Harz	143.75	145.18

In the Halle rock-salt mines there was an increase from $248.95 to $259.66, and in the brown-coal mines from $178.50 to $180.40. The average duration of a "shift" is eight hours.

SICK FUNDS.

Insurance against accident, insurance or pensions for aged workmen and women and for those laid up by wounds, sickness, and other causes reveal a desire and purpose so to regulate the working people's lot that poverty, with its ghastly accompaniments, shall be kept from his home. It is true these efforts are not always met with a satisfied spirit. Workingmen themselves denounce these systems. On the whole, however, meeting as they do great needs in Germany's transition from house and hand work to great mills and shops, they have proven blessings and safeguards. They tend toward socialism.

J. C. MONAGHAN,
Consul.

CHEMNITZ, *November 8, 1893.*

ART INDUSTRIES IN THE UNITED STATES.

I transmit herewith a translation of an article which appeared on the 5th instant in the Paris Figaro. The article summarizes the results of an investigation made under the authority of the French Government into the condition of the art industries of the United States, the remarkable development of which during the last few years has, as will be seen, aroused a very lively interest in this country.

Mr. Victor Champier, who, upon the occasion of the Exposition at Chicago, was charged by the Minister of Public Instruction and the Fine Arts to make a personal investigation into the condition of the industrial arts and the organization of schools of art in the United States, has returned to Paris.

He brings from his visit to the principal cities of the United States numerous documents of the most lively interest from the point of view of French art industries. He visited most of the industrial schools which during the last ten years have been established with incredible activity in all parts of the United States by virtue of the generosity of a multitude of donors. Millions of dollars have been provided for the establishment of these schools by wealthy American manufacturers and amateurs, who are making a colossal effort to create in their country a current of original art, so that they may speedily surpass the productions imported from Europe and rival French taste.

Already there are in America industries in which progress has been attained with a rapidity really ominous for the future of the French market. In gold and silver ware, in jewelry and in plate glass the American artists have exhibited a real originality and a perfection of workmanship which is not exceeded by our best fabricants. In wall paper, in woodwork, in furniture they produce novel effects, due to the very ingenious processes which they have invented. Wrought iron is with the Americans very much used, and they excel in all articles in the production of which both manual labor and machinery are employed. Terra cotta has had during the last five or six years an extraordinary development among them, and it is of this material that most of the external ornaments of their buildings are composed.

Mr. Victor Champier has studied the production in various departments of industrial art in America with especial care, because it is a very serious matter from the point of view of French interests. Indeed, in order to retain the markets which our artistic products have until the present time so largely found in the New World, is it not urgent that France shall make efforts commensurate with those of her American competitors? It is certain that we have much to do if we do not wish at our next universal exposition in 1900 to be distanced in more than one point. French fabricants, take notice.

A number of chambers of commerce, notably that of Lyons, requested Mr. Victor Champier to supplement the interesting mission with which he was charged by the French Government by making special reports on technical subjects. Mr. Champier encountered everywhere—at New York as at Philadelphia, at Boston as at Chicago, in the industrial centers of Cincinnati, of Pittsburg, of Baltimore, of Providence, of Paterson, of Yonkers, and of Grand Rapids—a most courteous and flattering welcome. "We owe to France all that we have accomplished," said the artists to him; "it is the least we can do to open freely to you the doors of our workshops."

Among the numerous specimens of American art work brought by Mr. Champier, we may mention curious samples of pottery, fragments of kaolin from Ohio as white and pure as those of Limoges; also some very beautiful vases, the products of Rookwood. All these objects have been offered to the museum of the Sèvres manufactory.

The conclusions reached by Mr. Victor Champier, as the result of his visit will, I think, be very gratifying to those interested in the art industries and the art schools of the United States, while the notice served by the Figaro upon the French fabricants that they must make special exertions to meet American competition in fields in which the former have long enjoyed a practical monopoly can hardly fail at the same time to inspire renewed efforts on the part of American artists and American manufacturers of articles of ornament and luxury.

SAMUEL E. MORSS,
Consul-General.

PARIS, *November 10, 1893.*

AMERICAN TRADE IN PERNAMBUCO.

It is very important for houses desiring to secure trade in this port of Brazil to send good, reliable men to represent them—men who understand the language and who can find out from the parties here every detail regarding packing, shipping, size of bale, bundle, box, bag, cask, etc. The commercial traveler should ascertain all this and forward the order for the goods and give details as to their preparation for shipment. Then every particular given by the agent or traveler should be carried out to the letter by the manufacturer or firm putting up and shipping the goods.

The commercial traveler coming to this country should be well paid. The house that wants to secure a good trade in its line will see to it that its representative is well paid.

Manufacturers of dry goods, such as prints, ginghams, cotton goods of all kinds, twills, plaids, light material for trousers, counterpanes for beds, striped hickory, etc., should bear in mind that medium-class goods are chiefly used in this city, as in all the principal cities of the province, with much of the best class of goods also, while in the interior inferior goods are used. For this reason, as well as other reasons, the importer who orders for city and for country trade wants the goods sent as ordered. Will our American manufacturers cater to this dry-goods trade, which is very large?

The English manufacturer, for instance, will supply thirty pieces of prints of different shades but of the same pattern, which would be some 1,200 yards of from 40 to 55 yards in a piece, while American manufacturers will not take an order for less than one hundred pieces, showing they do not want this trade, unless on certain conditions which they themselves prescribe. Our manufacturers refuse to print goods from 22 to 27 inches wide and from 40 to 45 yards in a piece, yet the Brazilian importer knows that his customer in the interior of the State will not be satisfied with goods of any other width or with a greater or less number of yards in a piece.

It is immaterial what reason they may have for wanting these goods thus and so. If our manufacturers want this trade, they must conform to the prevailing methods or convince the people of the interior of Brazil that a different width and a greater number of yards in a piece would serve their purpose better. I understand the English manufacturer will print goods as desired. Will our manufacturers print goods with a weight of one pound in from 2½ up to 7 yards, and from 6½ to 13½ inches wide, as one or two or a dozen importers may desire, and rolled round or put up flat, as other importers may wish? The English manufacturer prints to order.

So far as cotton goods of all kinds are concerned, we should control the bulk of the trade, and if the young commercial travelers who came here some time since representing forty-seven mills, manufacturing all kinds of cotton goods, will deal honestly and squarely by the importers, and if the manufacturers will place their goods upon this market satisfied with a reasonable profit, there is no doubt but that those forty-seven mills, located, I believe, principally in the Southern States, will secure a very large share of the trade in their line.

DAVID N. BURKE,
Consul.

PERNAMBUCO, *November 7, 1893.*

SUPERVISION OF IMMIGRATION IN LUXEMBURG.

I inclose a translation of a bill now before the Chamber of Deputies of the Grand Duchy of Luxemburg, and beg to suggest that it might aid our officials who are charged with the supervision of immigration in enforcing our laws against alien pauper and criminal immigrants if each immigrant could be compelled to present to our officials at the port of arrival a declaration or extract from a register similar to that mentioned in articles 1 to 4 of the proposed Luxemburg law, duly authenticated by the proper court or tribunal of the district or country in which the emigrant resided prior to his emigration.

Article 3 of the proposed law requires that the declaration (in our case an official certificate would be preferable) shall contain reliable information in regard to the civil standing, antecedents, and means of existence of the would-be immigrant.

Luxemburg has the same desire to exclude objectionable aliens that we have. The conditions of the two countries are, however, different. The means which it is proposed to use here to secure the exclusion of such undesirable persons are (1) police registration and control and (2) the filing of declarations made by all immigrants. As the parties reside under police control, if it is subsequently found that their declarations are false, they can be easily expelled. As, with us, it must be difficult to exercise any control over immigrants after they have landed, would not the requirement of a certificate issued by a credible foreign official of the district or country from which the immigrant comes (not by an American consul), giving official information on the points mentioned in article 3 of the proposed Luxemburg law—namely, the civil standing, antecedents, and means of existence of the would-be immigrant—be of the greatest possible value in aiding in the exclusion of the undesirable classes of immigrants?

Such certificates could be very easily obtained, for, as soon as the great steamship companies learned that these certificates would be demanded at our seaports they would instruct their agents in the various cities of Europe to require emigrants to obtain them before selling them tickets.

GEORGE H. MURPHY,
Vice-Commercial Agent.

LUXEMBURG, *November 10, 1893.*

PROPOSED LAW RELATIVE TO THE RESIDENCE OF FOREIGNERS IN THE GRAND DUCHY OF LUXEMBURG AND THEIR EXPULSION THEREFROM.

ARTICLE 1. Every foreigner, not already admitted to domicile, who proposes to establish his residence in the Grand Duchy, must, within five days subsequent to his arrival, make a declaration to that effect to the local authorities of the commune in which he wishes to establish his fixed residence.

In case of a change of residence, a new declaration must be made, within the same number of days, to the local authorities of the commune in which the foreigner shall have fixed his new residence.

The declaration shall cover all the foreign persons who live under the control of the person making the declaration or who reside with him, including his foreign servants.

An acknowledgment of the receipt of his declaration must be delivered free of charge to the person interested.

ART. 2. All persons are forbidden, subject to the penalties prescribed by the present law, to engage as servants or workmen or to receive as lodgers foreigners who can not prove that they have made the declaration prescribed by exhibiting the receipt provided for in article 1.

ART. 3. The declaration prescribed in article 1 shall contain the necessary information for proving and verifying the civil standing, antecedents, and means of existence of the foreigner and of the other persons covered by the declaration.

The declaration shall be transmitted at once to the court by the authority or agent authorized to receive it.

ART. 4. The extract from the register provided for in article 555 of the penal code shall be made in duplicate in collective form. One of these duplicates is to be remitted within twenty-four hours subsequent to the registration to the court and the other to the local authorities.

A ministerial decree shall determine the mode of transmitting the extracts.

ART. 5. Admission into the Grand Duchy may be refused to a foreigner recognized as dangerous or as liable to compromise the tranquillity and public order.

Establishment in the country may be refused to such foreigners, as well as to those who are without papers of identification or means of subsistence sufficient for themselves and their families.

ART. 6. A nonresident foreigner found in a state of vagabondage or of mendicity, in contravention to the law concerning itinerant professions, in a frontier commune of the country, to whom admission into the country has been refused in conformity with article 5, section 1, may be conducted immediately to the frontier by the public force.

Likewise nonresident foreigners found in the Grand Duchy, in numbers of three or more, in a state of vagabondage or mendicity, or in contravention to the law relative to itinerant professions, can be conducted directly to the frontier by the public force.

ART. 7. A foreigner resident in the Grand Duchy who, by his conduct, compromises the tranquillity or public order, or who has been condemned or is being prosecuted abroad for a crime or offense warranting extradition, in conformity with law or treaty, may be constrained to remove to a certain place, to live in a determined place, or he may be sent back or expelled from the Grand Duchy if his extradition is not demanded.

Likewise can be expelled: (1) The foreigner who continues to reside in the country after being duly warned that establishment in the Grand Duchy has been refused to him; (2) those who, after having been sent back or conducted to the frontier, in accordance with article 6, reappear in the country within two years; and (3) those who do not conform with the conditions of residence imposed upon them by paragraph 1 of the present article.

ART. 8. A foreigner in position to make the declaration prescribed by articles 9 and 10 of the civil code, by article 10 of the constitution, and by the one article of the interpretative law of February 5, 1890, can not be expelled prior to the expiration of the period allowed for the expression of his decision.

ART. 9. The measures provided by article 5 of the present law are taken by the Government and those provided by article 7, after deliberation by the Government in council, by the member of the Government having charge of the general police service.

These decisions (decrees) are not susceptible of any recourse.

The decree of expulsion is to be made known by a bailiff, upon the requisition of the attorney-general, to the foreigner concerned. The acts of notification are subject to the tariff of costs provided for repressive matters.

The decrees issued in accordance with article 5 shall be transmitted to the interested persons through an administrative channel.

ART. 10. The decree of expulsion shall fix the term allowed within which the expelled person must quit the country.

The expelled person being in a state of detention can be conducted to the frontier at the expiration of his detention.

ART. 11. The individual expelled under article 7 has the right to designate the frontier across which he desires to quit the country. If he neglects to make known his choice, the frontier may be selected by the attorney-general.

The expelled person who shall be found in the country after the expiration of the term allowed him in which to quit the country, shall be conducted to the frontier by the public force.

ART. 12. A fine of 10 to 25 francs shall be imposed upon:

(1) The foreigner who shall have neglected to make, within the prescribed term, the declaration called for by article 1, or who shall have complied in an incomplete manner with the prescriptions of article 3, or who shall refuse to produce his receipt upon the first demand.

(2) Those who shall have neglected to furnish, within the prescribed term the extract called for by article 4, or shall have produced it in a form incomplete in regard to the prescriptions of article 555 of the penal code.

(3) Those who shall have received as domestics, workmen, or lodgers foreigners not provided with receipts proving that they had made the declaration provided for by article 1.

Articles 565 and 566 of the penal code are applicable to contraventions covered by the present article.

In case of a repetition of the offense, the tribunal is authorized to impose, independent of the fine, an imprisonment of twelve days or more.

ART. 13. The foreigner shall be punished with a fine of 26 to 300 francs and an imprisonment of eight days to three months who, at the time of making the declaration of residence, shall have knowingly given to the competent authority false information in regard to his civil standing, his place of birth, or his last place of residence, or the civil standing, place of birth, or last residence of other persons comprised in his declaration.

ART. 14. An expelled foreigner who returns to the Grand Duchy without having previously obtained permission shall be punished with imprisonment of fifteen days to six months and a fine of 50 to 500 francs. At the expiration of his term of punishment he shall be conducted to the frontier.

ART. 15. Book I of the penal code, with exception of sections 2 and 3 and article 72 and section 2 of article 76, as well as the law of June 18, 1879, permitting courts and tribunals to use their discretion in connection with extenuating circumstances, are applicable in the case of misdemeanors provided for in articles 13 and 14.

ART. 16. The law of March 10, 1880, and all other legal provisions inconsistent with this law are abrogated.

EMANCIPATION OF LABOR IN GUATEMALA.

I inclose decree 471 of this Government, issued by President Barrios.

This is one of the most important steps taken by this Government in late years, being nothing less than a proclamation of the emancipation of the laboring classes from servitude.

By the *Mandamientos de jornaleros* it was the custom of this Government, through its military agents, to take forcible possession of the persons of the lower classes at any time, taking them away from their homes and personal pursuits and sending them to work for an arbitrary wage wherever they might be desired; and it often happened that the voluntary laborers of some small planter would be taken away and sent to a more powerful rival.

HENRY C. STUART,
Consul-General.

GUATEMALA, *November 1, 1893.*

DECREE NO. 471.

[Translation.]

* * * * * * *

Considering that the authorities of the Republic were instituted for the protection of its inhabitants in the enjoyment of their rights, which are liberty, equality, and the security of person, honor, and property;

That the enforced labor imposed by private proprietors upon the natives, who constitute a majority of the inhabitants of the Republic, is contrary to this precious guaranty established by the constitution;

That the extension and development of agricultural enterprises, a love of work, and the desire to create for themselves a comfortable existence which has been awakening in all classes have done away with the causes which led to the promulgation of the law of 1877 regulating the service of day laborers;

That one of the purposes contemplated by the Government, which it deems a duty it can not evade, is the emancipation of the Indian from his present condition of servitude, elevating him to the level of his fellow citizens and bringing him to share the blessings of civilization;

That for the obtaining of this beneficent result it is proposed to establish schools and colleges for the exclusive benefit of the natives, for which necessary funds must be procured;

That it is proposed also to enact adequate measures for the protection of agriculture, the principal source of public wealth;

That it is the duty of all citizens to contribute their personal services, suitably remunerated, to the needs of the nation;

Therefore, in the exercise of the powers in me vested and in agreement with the council of ministers, I have judged it proper to decree and do decree:

ARTICLE 1. There shall be abolished from March 15, 1894, the orders for day laborers heretofore sanctioned by law. * * *

ART. 2. After the aforesaid date labor on behalf of private persons will be free throughout the Republic.

ART. 3. Those who have been bound to service by orders will be incorporated in the companies of sappers* now established in the country.

ART. 4. There are excepted from this obligation: (1) Those who cultivate a piece of land or who have been qualified for the purpose with a sum of more that $30; (2) those who pay into the respective administrations of revenues the amount of $10 per annum.

ART. 5. The amounts which by this means accrue to the public treasury shall be applied exclusively to the foundation and maintenance of schools and institutions intended for the civilizing of the native class.

ART. 6. The cultivators or owners of land or any of their agents who certify falsely to having contracted with a laborer will, in addition to forfeiting to the treasury the sums thus assigned, be criminally liable on the charge of perjury.

* * * * * * *

BAGDAD-AMERICAN TRADE.

The commerce between Bagdad and the United States has become during the past few years of considerable importance, and there is reason to suppose that within a few years the greater portion of our indigenous products will find their principal market in the United States. But experience shows that the best—in fact, the only—means of realizing this is to establish an agency for the reciprocal introduction of the products of the two countries. This agency should be in possession of the addresses of the principal American merchants and manufacturers, in order to keep them informed of whatever may be of interest to them and to furnish them regularly with samples.

Formerly all the trade in wool between Bagdad and the United States was carried on through commission merchants in London and Marseilles, and these received commissions, brokerage, etc., which perceptibly increased the price at times, rendering negotiations very difficult; but by the direct business of to-day there is a decided saving.

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* Military.

Unfortunately, the want of an agency has prevented American products from finding a market here such as is found in the United States for those of Bagdad. Such an agency would cause the introduction of a large quantity of American manufactures, especially cotton goods, into this country, where, I believe, they would compete favorably with English and other European goods.

Bagdad exports.

Articles.	Quantity exported annually.	Whither exported.
Arabi wool ... bales	180,000	United States.
Awassi wool ... do	8,000	London and Marseilles.
Karadi wool ... do	5,000	Do.
Persian carpets ... number	15,000	Do.
Gallnuts ... kilograms	80,000	Do.
Gum dragon ... do	400,000	Do.
Gum in pill ... do	50,000	Do.
Opium ... do	80,000	Do.
Persian tobacco ... do	1,300,000	Syria.
Bagdad dates in skins ... skins	30,000	London, Syria, and Egypt.
Bassorah dates in boxes ... boxes	800,000	Europe and America.
Dates in baskets ... kilograms	1,800,000	France.
Raisins ... do	500,000	Do.
Silk of Recht ... do	14,000	Syria.
Intestines ... number	300,000	Trieste.
Skins and astrakhan ... do	340,000	Trieste and France.

Bagdad imports.

Articles.	Quantity imported annually.	Where from.
Different kinds of iron ... tons	1,000	England.
Copper and brass ... do	600	London and Marseilles.
Different kinds of cotton tissues	...	Principally from England.
Different kinds of silk tissues and woolen cloth	...	Principally from France and Germany.
Sugar in loaf ... cases	290,000	Marseilles generally and rarely from Germany.
Coffee ... kilograms	200,000	India and Hadjaz.
Tea ... do	140,000	Do.
Petroleum ... boxes	14,000	United States and Batoum.
Matches	...	Europe.

JOSEPH ASFAR,
Vice-Consul.

BAGDAD, *October 19, 1893.*

THE TRADE OF ITALY.

Without taking into account the precious metals, the trade of Italy for the first nine months of 1893 amounted to $308,436,214, showing an increase of $18,000,000 compared with the same period in 1892.

[illegible]	June	Compania.
Zoquiapan Hacienda	June 1	
Zavaleta-San Rafael	Mar. 2	Zavaleta to San Rafael.
Total		

.655 miles.

* Meter=39.37 inches.

Consular Reports No. 161—face p. 303.

In 1893 (nine months) the imports amounted to $184,773,662, against $165,638,000 in 1892; the exports amounted to $141,770,000, against $143,000,000 in 1892. There has therefore been an increase of $19,135,662 in the imports and a slight falling off in the exports. These two facts are to be explained as follows: At the beginning of the year (February and March), owing to very heavy rains, it was feared that the bread crops might fail, and consequently large purchases were made; hence the notable increase in the imports, wheat figuring in that increase to the extent of $10,000,000. The grain crops have, however, turned out well, and it will not be necessary to make any purchases during the last three months of this year, which will modify the balances at the close of 1893.

There has been an increase of $3,000,000 in the importation of raw materials—$63,000,000 for the first nine months of 1893 against $60,000,000 for the same period in 1892.

There has been an increase of $6,000,000 in the exportation of certain articles and a decrease of $7,250,000 in certain other articles. The falling off is due to a short oil and silk crop last season, the exportation of olive oil falling off $2,000,000 during the early spring, and the exportation of raw silk falling off $4,400,000.

The following table shows the increased exportation of the articles named:

Articles.	Increase.	Articles.	Increase.
Wine	$1,300,000	Cotton goods	$400,000
Brimstone	800,000	Hemp, flax, and jute goods	200,000
Vegetables	600,000	Oranges and lemons	1,650,000
Straw hats	200,000		

WALLACE S. JONES,
Consul-General.

ROME, *November 16, 1893.*

THE RAILROAD SYSTEM OF MEXICO.

Though the courtesy of Gen. Manuel Gonzales Cosio, secretary of communications and improvements, I am enabled to furnish certain statistics of the railroad system of Mexico.*

The railway era in Mexico dates from 1880 to 1886, the construction period of the Mexican Central and the Mexican National lines, for prior to that time this country had but 637 miles of railroad.

ISAAC P. GRAY,
Minister.

MEXICO, *October 7, 1893.*

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*See table opposite.

THE TRADE OF SPAIN.

During the first nine months of 1893 Spain's exports and imports were $16,511,562 less than during the corresponding period of 1892, and during the first nine months they were less by $24,552,246 than during the corresponding period of 1891. The total foreign trade for the first nine months of the past three years was as follows:

1891	$238,231,455
1892	213,679,209
1893	197,167,647

This decline is owing almost exclusively to the strained commercial relations between Spain and France. Their trade during the first nine months of 1892 amounted to $63,675,400, and during the corresponding period of 1893 to but $49,896,100, that is to say, $13,779,300 less in 1893 than in 1892:

Period.	Exports to France.	Imports from France.
9 months of 1892	$43,345,400	$20,330,000
9 months of 1893	34,002,000	15,894,100

During the last few years Spain's exportations to the United States have been diminishing, owing to the fact that her fruits and wines are being more and more supplanted by those of California. Her importations, however, from the United States during the same period have shown a tendency to increase, which is rather remarkable when one considers that the exchange has been constantly rising and is now over 20 per cent. The principal articles that the United States send to Spain are raw cotton, crude petroleum, and staves. From all countries Spain's importations of those articles during the first nine months of 1891, 1892, and 1893 were as follows:

Articles.	1891.	1892.	1893.
Raw cotton	$12,862,994	$12,798,214	$11,670,000
Crude petroleum	1,513,800	1,129,128	1,335,670
Staves	2,105,674	2,893,400	2,720,200
Total	16,482,468	16,820,742	15,725,870

On the whole, there seems to be no growing need of a direct line of steamers between the ports of Spain and the United States; and therefore it seems likely that for some years to come the exchange of commodities between the United States and the northern part of Spain will be via Liverpool and Bordeaux; between the United States and the eastern part of Spain, via Bordeaux, Marseilles, and Habana; and between the United States and the southern part of Spain, via Habana.

Imports and exports of Spain and the Balearic Isles.

IMPORTS.

Articles.	1891.	1892.	1893.
	*Pesetas.**	*Pesetas.**	*Pesetas.**
Stones, minerals, and crystals	61,949,371	57,512,694	55,188,615
Metals	26,857,441	23,580,448	17,623,990
Drugs	41,149,686	37,664,277	39,233,911
Cotton	76,995,246	76,057,966	66,731,917
Other vegetable fibers	24,775,690	24,950,240	19,896,717
Wool	32,162,244	32,414,794	19,347,574
Silk	14,146,599	15,552,457	14,001,188
Paper	7,781,627	7,991,187	8,153,242
Wood	37,623,417	41,498,418	34,663,615
Animals	35,404,488	27,889,756	25,479,903
Machinery	37,638,693	43,004,664	30,353,153
Alimentary substances	143,542,564	120,796,546	138,127,487
Miscellaneous	5,515,799	4,814,356	3,879,114
Special importations	87,440,932	73,094,984	46,775,432
Total	632,983,797	586,822,787	519,455,858

EXPORTS.

Minerals and ceramics	61,483,645	60,214,643	64,103,863
Metals	86,698,933	101,278,292	81,460,836
Drugs	21,005,818	21,404,942	21,089,207
Cotton manufactures	20,668,163	29,417,128	36,360,839
Other vegetable fibers	2,906,542	4,319,797	4,709,020
Wool	8,333,439	12,702,554	18,388,455
Silk	3,073,699	4,575,977	3,029,091
Paper	6,636,998	8,463,922	6,736,697
Wood	26,723,393	25,019,613	23,106,867
Animals	33,760,215	29,990,619	31,508,104
Machinery	674,275	343,592	389,774
Alimentary substances	284,438,866	181,545,564	173,566,229
Miscellaneous	1,769,493	2,296,617	1,933,396
Total	558,173,479	481,573,260	466,382,378

RÉSUMÉ.

Imports	632,983,797	586,822,787	519,455,858
Exports	558,173,479	481,573,260	466,382,378
Excess of imports	74,810,318	105,249,527	53,073,480

*1 peseta = 19.3 cents.

HERBERT W. BOWEN,
Consul.

BARCELONA, *November 22, 1893.*

EMIGRATION FROM NORWAY.

During the year 1892 there were 21,826 emigrants from Norwegian ports, 17,049 of whom were Norwegians. The latter number, compared with that for 1891, shows an increase of 3,708 persons.

No country, in proportion to its population, contributes annually so much to the population of the United States as Norway, and it is chiefly the agricultural class from which the greatest number of emigrants is drawn. Of the total Norwegian emigration in 1892, 72 per cent came from the rural districts. If the population of Norway in 1892 be calculated at 2,000,000, the emigration amounted to about 0.9 per cent.

The subjoined tables contain the official reports published by the Government central statistical bureau.

Total number of Norwegian emigrants.

Year.	Men.	Women.	Total.
1892:			
From rural districts	7,714	4,513	12,227
From cities	2,405	2,417	4,822
Total	10,119	6,930	17,049
1891	7,784	5,557	13,341
1890	5,878	5,113	10,991
1889	7,076	5,566	12,642
1888	13,138	8,314	21,452

Age of Norwegian emigrants in 1892.

Classification.	Up to 15 years.	15 to 30 years.	30 to 65 years.	65 years and above.	Age not given.
From rural districts	1,776	8,121	2,222	108	....
From cities	940	2,679	1,176	26	1
Total	2,716	10,800	3,398	134	1

Besides the 17,049 Norwegians who in 1892 emigrated from this country, persons of other nationalities were represented in the emigration through Norwegian ports as follows: Swedes, 4,679; others, 98.

About 47 per cent of the total number of emigrants embarked at this port (Christiania). The emigrants embarked at the following ports:

Ports.	1892.	1891.	1890.	1889.	1888.
Christiania	10,262	7,632	6,735	7,737	13,259
Christiansand	2,133	1,731	1,391	1,254	2,765
Stavanger	1,827	1,331	1,340	1,144	1,801
Bergen	2,009	1,451	1,009	1,302	1,633
Drontheim	4,429	3,305	2,219	3,297	5,196
Other ports	1,166	977	674	822	1,506
Total	21,826	16,427	13,368	15,556	26,160

GERHARD GADE,
Consul.

CHRISTIANIA, *November, 1893.*

THE LUXEMBURG LEATHER-GLOVE INDUSTRY.*

The Luxemburg leather-glove industry was founded at the beginning of this century by a French manufacturer, Luxemburg being at that time under French rule. This manufacturer had only means to enable him to carry on the business on a modest scale, but as he found in this little country cheap wages for hand work, his business grew. During recent decades machine sewing has been introduced, but certain parts of every glove must still be sewed by hand. Nearly all of the processes through which the skin must pass before it becomes a finished glove require hand work. In some cases, it is true, machinery can be used, but the result is not as satisfactory as when the work is done by hand; for every skin, every piece of leather, even every fragment of such a piece, must be treated individually according to its peculiarities.

It is calculated that a raw skin must pass through two hundred and nineteen different manipulations before it becomes a glove, a large number of them being the work of women and girls. For this reason cheap wages for women are an indispensable prerequisite of a prosperous glove business, without which there can be no continued success. In this respect Luxemburg was found to be very suitable for this industry, as—especially in the poor, mountainous districts in the northern part of the Grand Duchy, the Ardennes—the women and girls are satisfied with the very lowest wages. Prior to the introduction of machine sewing the daily wages of women and girls were 12 to 15 cents, and they are to-day for the most part not much higher.

At first the glove industry supplied only the home market and frontier districts of other countries, but between 1820 and 1830 the sales were extended to all parts of Belgium, Holland, and Germany. The separation from Belgium in the third decade of the century was a severe blow to the industry, but this injury was overcome by the admission of the Grand Duchy into the German customs union. Still more injurious was the political and commercial crisis of 1848 and 1849. Subsequently, however, the industry, which was still confined within modest limits, developed and flourished, especially during the Franco-German war, which naturally increased the exportation to neutral countries.

There are now four large and several small leather-glove factories in Luxemburg. These produce about 60,000 dozen pairs of gloves per annum and give employment to about 2,000 persons. The fabrication covers all the processes from the raw skin to the finished glove. The materials (lamb and kid skins) come in all qualities from all parts of the world.

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* In submitting this report Mr. Murphy writes: Previous to 1890 three great industries in Luxemburg were actively interested in our import trade, namely: (1) The Luxemburg iron and steel industry; (2) the Luxemburg cloth industry; and (3) the Luxemburg leather-glove industry. The tariff law of 1890 has almost entirely terminated the connection of the first two of these industries with our markets. Upon the leather-glove industry it seems to have acted less severely. Nearly all the invoices which I authenticate cover leather gloves. Since this office was first opened I have had no cloth invoice and only two covering iron products. I am informed by gentlemen in the iron industry that the only product which they can now export to the United States is block steel intended for use in the manufacture of telegraph wire.

The chief markets are Germany, England, thè colonies, and North and South America. The male hands are Luxemburgers, French, Germans, and Belgians; the female hands are all Luxemburgers.

The tanning, dyeing, and cutting are of the French sort. The skins are softened in well water, then laid in a lime solution until the hair and the fatty substances can be easily removed, then they go through several processes in cold water; they are next rolled and tossed about in a dough composed of flour, egg yolks, salt, alum, and water; they are then dried and stretched. The leather thus obtained is then dyed. When light colors are desired the skins are soaked in the dye solution. The dark colors are given to the leather by using brushes. To fasten the colors the leather is first thoroughly moistened with human (male) urine, which is purchased in large barrels from prisons and military barracks. When they become dry the dyed skins are stretched and are then ready for cutting. The cutter, with a yard stick, measures each piece of leather and prepares it so that it can be cut under a press on a "calibre" (steel glove model). These pieces are then sewed together on a machine by a sewing girl, but for finishing the buttonholes, seams, etc., hand sewing is customary. Finally, the gloves are "dressed," and thus brought into salable shape. They are then packed and are ready for shipment.

One factory in Luxemburg works exclusively for the American market, and another sends a large percentage of its gloves to its New York agent.

GEO. H. MURPHY,
Vice-Commercial Agent.

LUXEMBURG, *December 1, 1893.*

ITALIAN EMIGRATION TO THE UNITED STATES.

My attention having been directed to the large number of emigrants leaving the Province of Salerno, comprised within this commercial agency, I deemed it advisable to obtain reliable statistics as to their number, destination, and character. I now present carefully prepared statistics showing these and other particulars.*

The chief sources of information are the passports given by the syndics and police authorities.

Instructions are given to distinguish real emigrants in search of temporary or permanent labor from travelers who journey for pleasure, study, or business. The latter belong to the better class and pay the Italian Government a fixed charge for their passports of 10 lire (about $2), while laborers, etc., are taxed 2.40 lire (48 cents).

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*For these statistics I am indebted to the courtesy of Commendatore Bodrio and Comm. Casanuova, lately in the Ministry of Interior.

Syndics and political authorities are required to furnish the names of those who are known to have left their native places for foreign parts without regular passports to avoid military duty or for other reasons.

While these figures may not represent the exact number of emigrants leaving the province, as many declare their intention of journeying to a neighboring country in search of work, and thence depart for the United States, they are as reliable as similar returns for any other country.

The last returns from the whole of Italy during the six months from January to July, 1893, show an increase of 29,029 emigrants over the first six months of 1892.

The province of Salerno, with a total population of 568,541, had no temporary emigration in 1892 and 1893; but in the first six months of 1892 the number of permanent emigrants was 4,760, and in the same period of 1893 it was 8,124, an increase of 3,364, or a little over 41 per cent.

The province of Salerno leads all others in Italy in the number of permanent emigrants to non-European countries. From all Italy the total number of emigrants to the United States in 1892 was 42,953, of which the province of Salerno contributed 5,570, or nearly one-eighth of the whole from fifty-three provinces.

Of the total emigration from the district of Salerno 5,305 were males, 2,618 females, and 825 boys and 538 girls under 14 years. Their professions, trades, and calling were as follows:

Occupations.	Males.	Females.	Total.
Farmers, shepherds, agricultural laborers, etc.	1,916	1,261	3,177
Stonecutters, masons, and bricklayers	592	57	649
Laborers, porters, navvies, etc.	933	281	1,214
Mechanics, various	649	156	805
Grocers, hotel-keepers, waiters, clerks, etc.	194	54	248
Merchants and shopkeepers	154	....	154
Professional	1	....	1
Servants and nurses	10	31	41
Paupers	25	12	37
Other conditions and callings	6	15	21
Unknown occupations	....	213	213
Total adults	4,480	2,080	6,560
Under 14 years of age	825	538	1,363
Grand total	5,305	2,618	7,923

The general motive actuating emigrants here, as elsewhere, is a desire to ameliorate their condition; but I will refrain from reporting on the special motives which cause the emigrants from Salerno to leave their native country until a careful study and inspection of the district will enable me to do so understandingly.

HENRY G. HUNTINGTON,
Commercial Agent.

CASTELLAMMARE, *November 27, 1893.*

MODIFICATIONS OF GUATEMALAN CUSTOMS DUTIES.

[Extracts from recent Guatemalan decrees, transmitted to the Department by Consul-General Stuart.]

DECREE NO. 463.

Whereas the duties payable on the introduction of cattle contributes to the high price of meat.

Whereas it is the duty of the Government to dictate such measures as may enable the poorer classes to easily obtain articles of general consumption.

Therefore, it is decreed that from this date [October 12, 1893] cattle and hogs may be introduced into the Republic free of all taxes.

DECREE NO. 464.

Whereas it is advisable, in order to enable the working classes to secure meats at low prices, to suppress the duties on the imports of the same and the taxes upon the slaughtering of sheep and hogs; therefore, it is decreed that from this date [October 13, 1893] the importation of meats (dry, smoked, or salted) is free of all duty.

The slaughtering of sheep and hogs is also free of all fiscal or municipal taxes.

DECREE NO. 465.

Whereas the scarcity of the necessaries of life causes difficulties to the poorer classes of society;

Whereas, owing to the economic situation of the country, the exemption from payment of duty on all articles of this class can not be permitted, but that it is convenient, however, to do so with regard to those articles of more general consumption, such as flour which is made in the country;

Whereas wheat can be produced on a very large scale in the country, and as by the levying of duties on the importation of same it is natural that the produce thereof in this country will increase, inasmuch as there will be a greater demand and easier sale;

Therefore, it is decreed that from the 15th instant [October, 1893] the making of flour in the country is free of all taxes (fiscal, municipal, or other).

Imported flour will from this date pay in the custom-house a duty of $2 per quintal, gross weight.

Of the said $2.50 [*sic*] there are destined 25 per cent for the charitable institutions and an equal sum for the respective municipalities.

From this date the sum of $1 will be paid on each quintal of wheat imported, gross weight.

The public granaries established in the country are abolished, and the stores will remain subject to the vigilance of the respective municipalities.

DECREE NO. 466.

Whereas it is convenient to establish a fixed basis for the collection of the duties on imports, in order that merchants may easily calculate the cost of their goods during a long period;

Therefore, it is decreed that from the 1st of January, 1894, and thereafter, the custom-houses of the Republic will charge 25 per cent of the import duties in national gold coin, without any alteration during the whole of the year 1894.

DECREE NO. 467.

From this date [October 14, 1893] the tax on each bottle of aguardiente purchased at the depots for consumption shall be 46 cents.

THE MANCHESTER SHIP CANAL.

This great enterprise—the cutting of a canal from tide water at Liverpool 35½ miles to Manchester, 172 feet wide, 26 feet deep, capable of permitting vessels of 6,000 tons to steam directly to this city—is now so nearly completed that the opening for traffic is officially arranged for January 1, 1894.

This canal has already cost some $75,000,000—$35,000,000 more than the original estimates, owing to unforeseen engineering difficulties, the deceptive nature of the soil, and other causes.

The total fall from the water level in Manchester docks to Liverpool is 60½ feet. For 14 miles out from Manchester the rivers Irwell and Mersey form the course of the canal; but many of the crooks and bends of these tortuous streams have been cut off, so that, with the exception of a few gradual curves, the course for the the whole length of the canal is due west to Liverpool. The width and depth are as follows:

	Feet.
Average width at the water level	172
Minimum width at the bottom	120
Minimum depth of water throughout	26

There are five large locks, five intermediate, and one small one, viz:

Location.	Dimensions of large locks.	Dimensions of intermediate locks.	Rise.
	Feet.	*Feet.*	*Feet.*
Eastham, tide water	600 by 80	350 by 50	
Latchford	600 by 65	350 by 45	16½
Irlam	600 by 65	350 by 45	16
Barton	600 by 65	350 by 45	15
Mode Wheel	600 by 65	350 by 45	13

The capital (I copy from a publication of June last) is thus set down:

Ordinary shares	$19,466,000
Preference shares	19,466,000
Loan received	27,252,400
Total	66,184,400

The borrowing powers are $9,733,000.

As regards the United States, the object of the undertaking is to induce exporters to ship cotton and food products direct to Manchester. The directors are responsible for these two statements: First, three-fourths of all cotton coming to the British islands is manufactured in Manchester and vicinity; second, within a radius of 30 miles there are 7,500,000 mouths to feed.

During an interview which I had with Mr. Bythell, one of the directors, in answer to my natural inquiry for rates of freight and dues, etc., he replied that they were not able to give any. He did not assign any reason and probably did not then know what I have learned from recent journals—the decision of the president of the board of trade inquiry into canal tolls. I quote:

> We understand that the Ship Canal Company will next session promote a bill in Parliament the chief object of which will be to fix the rates and charges on the canal, the president of the inquiry into canal tolls having decided that the company can not be exempted from the regulations of the act of 1888 (which imposes on the Board of Trade the duty of enforcing the schedules), unless Parliamentary sanction is specifically obtained.

Toward the end of October the Ship Canal Company, which is especially anxious to interest Manchester cotton-spinners, issued a statement, from which I extract the first five paragraphs:

STATEMENT TO BE SIGNED BY COTTON-SPINNERS.

To cotton-shippers and others.

In January next the ship canal will be opened to Manchester, and vessels from American and other cotton ports will be able to proceed direct to, and discharge their cargoes in, the Manchester docks.

For the information of shippers and importers of cotton, we take this opportunity of stating that it is our intention to encourage the use of the ship canal by giving preference, when buying to arrive, to cotton shipped direct to Manchester, and, when buying on the spot, to cotton imported direct to, and stored in, Manchester warehouses.

The present cost of conveying a ton weight of cotton from a ship in the Liverpool docks to Manchester is $3.82, whereas the total amount payable to the Manchester Ship Canal Company on cotton landed in the Manchester docks for canal toll, wharfage, and landing will be $1.70 per ton.

The saving by importing direct to Manchester instead of via Liverpool will thus be $1.62 [*sic*] per ton.

In order to encourage shipowners to begin loading vessels for Manchester, and thus help shippers to make freight engagements, the Ship Canal Company have agreed not to charge ship dues upon cotton vessels delivering cargo at Manchester during the cotton season ending September 30, 1894. This will be a saving to the ship of 30 cents per net registered ton.

WILLIAM F. GRINNELL,
Consul.

MANCHESTER, *November 28, 1893.*

THE MOZAMBIQUE COMPANY.

The districts of Manica and Sofala, in the province of Mozambique, have long been known to be rich in gold. During the early days of Portuguese occupation of this province considerable quantities of gold were obtained from time to time, and old records show that by reason of this discovery the wealth of the Government was not a little augmented.

In 1835 the then governor-general of Mozambique wrote:

> Sofala, or Zimboe, in former times was a populous kingdom where the King [native] held his court. It is situated on *terra firma* about 2 leagues from the coast at a place called

> Quiteve. The land is very fertile and the richest in gold mines of the whole territory of eastern Africa. In former days the chiefs of Sofala paid as rent for their lands eighty bars of gold [valued at about $12,000,000]; at this time they do not give more than thirty.

This, however, could not have been an annual rental.

Antonio Bocano, in his "Deccada," states:

> The province of Monomotopo (Manica) is about 300 leagues in circumference and the greater part is extremely rich in gold.

Later explorers, such as Livingstone, Thomas Bains, and Carl Mauch, testify to the amount of gold in these districts. It was the last named who in 1871 discovered the ruins of Zimbabye (though some authorities state that they were visited by a wandering American sailor years before) and found that the natives living in the vicinity of these ruins had long been accustomed to work the alluvial gold-bearing ground.

Edward J. Payne, M. A., in his "History of European Colonies," writes:

> Wherever a petty prince [native] reigned on the African coast the Portuguese landed to trade with him. One of the earliest Portuguese factories was placed at Sofala, which was believed to be the Ophir of the Bible, the port of the rich land of Mozambique.

It was to exploit these gold fields that a company under the title of the Compagnie de Fondateurs du Zambese was founded in Paris in 1878 by Col. Paiva d'Andrada, a Portuguese officer, who has done much toward opening up this country. He made several expeditions, starting from near where Beira is now located, about 40 miles north of the old port of Sofala, and located many quartz reefs rich in gold, besides several alluvial fields, but on account of the great difficulties of transport and communication was not able to accomplish all he desired. He more than confirmed, however, the accounts of the earlier travelers and writers.

The Mozambique Company, formed in 1888, took up the work of the former company. The Mozambique Company's capital at the start was a modest one—$200,000—but a year later it was doubled, and, as a concession of the mineral rights of the district had been obtained without payment, the whole capital was available for working purposes. In 1891 the capital of the company was increased to $5,000,000, of which $2,000,000 was paid up, and a royal charter was obtained from the Portuguese Government giving the company sovereign powers over the district, and the sole right to levy customs and other taxes; to construct and work roads, railroads, canals, ports, piers, docks, bridges, waterworks, telegraphs, and other public works; to navigate the interior rivers of the district, with the exception of the branches of the Zambesi and Shire rivers; to prospect and mine for gold and other minerals and precious stones; and to work the coral, pearl, and sponge fisheries. It also has the sole right to hunt elephants in the district.

On the other hand, the company, in addition to other engagements and obligations, agreed to construct a railroad from the coast to the western frontier of the district. The construction of this line was afterwards intrusted to a subsidiary company formed for the purpose.

It was not until 1892 that the territory comprised by the two districts of Manica and Sofala—and now designated as the province of Manica-Sofala—was formally transferred to the company. During the previous year there had been much friction between the Portuguese and English over the boundary line between their two territories, and hostilities at one time seemed imminent. The Anglo-Portuguese convention, signed in Lisbon June 11, 1891, defined the boundaries between the two territories and provided for an immediate survey, and thus what might have culminated in serious trouble was amicably settled. Everything having been satisfactorily arranged the company moved in and assumed entire control, making Beira its headquarters.

Beira had by this time become a thriving port. Prospectors and others bound for the gold fields in British, as well as Portuguese, territory had made it their point of departure from the coast, and many enterprising merchants from older ports had opened places of business and were doing a thriving trade. One European steamship line is now running regular monthly steamers via the north, and some half dozen lines are running semimonthly and monthly steamers via the Cape of Good Hope to Beira. Parties for the gold fields proceed from Beira up the Pungue River in river steamers to the town of Fontesvilla, some 42 miles distant. Fontesvilla is the starting point of the Beira Railway, which is being constructed on a gauge of 2 feet, to be widened later on to 3 feet 6 inches—the standard gauge of all railroads in South Africa—and when fully completed will be on the eastern border of the British South Africa Company's territory. Beyond Fontesvilla is a stretch of swampy land many miles in extent, and beyond the swamps is a belt of country infested with the tsetse fly.

The railroad is about completed to the end of the first contract, 77 miles from the point of departure; its present terminus is well out of the swamps, but is still in the fly country. The materials for the construction of the second contract—some 35 miles in length—are on the water, and are now due at Beira. When this contract is finished, which will probably not be until May next, the terminus of the first section of the line will be at a place called Chimoia's Kraal, or Chimoia, 120 miles distant from Fontesvilla and well out of the fly country. Heavy rains delayed the construction of the first 75 miles and did much damage to the line, otherwise it would have been finished long ago.

On account of the tsetse fly, whose bite causes certain death to oxen and other domestic animals, all goods at present have to be transported from Beira or Fontesvilla to Chimoia, through the miles of swamps and fly country intervening, by native porters, an expensive process, as it necessitates all goods being packed in loads of 50 or 60 pounds weight; consequently no mining machinery can go up, and mining is in its infancy, though prospecting is actively going on.

When the railroad is open for traffic to Chimoia there will be no serious obstacle to the transport of heavy goods and machinery, as there are good wagon roads beyond and ox wagons are plentiful.

The Mozambique Company is confident that within another year mining operations will be actively carried on throughout its territory. This territory covers an area of 60,000 square miles, is healthy in the uplands, and, besides being rich in minerals other than gold, is marvelously fertile. The company has fully recognized the immense value and importance of the gold fields, especially those in and about Massi Kessi and the mountains to the south of that place, and has framed a code of mining laws that are liberal and compare well with those of other countries. A few extracts from the mining laws and a map are annexed.*

W. STANLEY HOLLIS,
Consul.

MOZAMBIQUE, *September 30, 1893.*

NORWEGIAN SAVINGS BANKS.

At the close of the year 1892 Norway had 360 savings banks, 67 of which were in the cities and 293 in the country districts.

The total number of depositors having open accounts with the banks at the close of 1892 was 499,245, of whom 282,041 were in the cities and 217,204 in the country districts. Compared with the population of the country, this shows an average of 248 depositors to each 1,000 inhabitants.

The total amount of money to the credit of the depositors on December 31, 1892, amounted to $53,848,044, against $52,693,497 in 1891, showing an increase of $1,154,547, or 2.19 per cent (the increase in 1891 was 1.27 per cent, in 1890 it was 4.07 per cent, and in 1889 it was 6.33 per cent); but, as the interest credited to the depositors amounted to $2,289,263, the repayments exceeded the deposits by $1,134,716.

The following table shows the increase in amounts deposited during the last five years, together with the interest credited to depositors.

Year.	Increase in amounts deposited.	Interest credited to depositors.	Increase of deposits over repayments.	Increase of repayments over deposits.
1888	$1,557,250	$1,519,623	$37,628	
1889	2,976,586	1,509,035	1,467,551	
1890	2,033,208	1,560,412	472,796	
1891	663,596	1,904,127		$1,240,531
1892	1,154,547	2,289,263		1,134,716

By examining the above statements it will be seen that the average amount for each depositor in 1892 was $108, against $109.27 in 1891. The corresponding amount in 1885 was $115.50; in 1880, $118.18; in 1875, $124.62; and in 1870, $112.29.

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* Filed in the Department.

The assets of the savings banks on December 31, 1892, amounted to $7,073,187, of which $3,720,706 belonged to the banks in the cities and $3,352,481 to the banks in the rural districts. Compared with the year 1891, the present year shows an increase of $92,738.

The average interest paid the depositors during the year 1892 was 4.45 per cent; the interest received on loans averaged 5.69 per cent.

The expenses of all the banks, including taxes, amounted in 1892 to 0.47 per cent of the capital invested.

GERHARD GADE,
Consul.

CHRISTIANIA, *November, 1893.*

SETTLEMENT OF THE COAL STRIKE IN ENGLAND.

On the 10th of October, 1893, after the strike of the coal-miners of Great Britain had been in progress ten weeks, I made a report dealing with the cause and effect of the trouble.* A history in detail of the strike up to that time was also given. It was then stated that a number of the miners who had been resisting the proposed reduction of 25 per cent in wages were returning to work at the old rate, that is, without any reduction whatever. It was the policy of the Miners' Federation that all should do this that had the opportunity. As a result, collieries were thrown open by a sufficient number of owners to give employment to 100,000 men, or about one-fourth of all those engaged in the strike. It was stipulated that those returning to work should pay 25 cents per day out of their wages toward the support of the great body of strikers. The fund thus provided, together with public subscriptions, has constituted the entire support of an army of nearly 300,000 striking miners for the past six weeks, their original fund of $2,000,000 having become entirely exhausted. The intervention of the mayors of several large cities of the districts suffering the worst results from the strike proved a failure, as did also several subsequent conferences on the part of the mine-owners and the men.

The increased output occasioned by the return of a portion of the men to their employment for a time reduced the price of coal, which had become inflated. This decrease was but temporary, for, with the advance of cold weather and increased demand, prices again rose to $5, $7.50, and $10 per ton for different grades of coal used for manufacturing purposes and for house fuel.

One result of this condition was to enormously increase the profits of those employers who did open their mines. In fact, it is current report that some amassed large fortunes in the few weeks the mines were open. At the same time industries were stifled and commerce stagnant. Many manufacturers could not operate, because the price of fuel made it impossible to produce goods to be sold at a profit.

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* See No. 158, p. 368.

The miners who had returned to work, noting these conditions, demanded a share of the employers' profit in advances of 10, 20, 30, and 40 per cent in different quarters. This was just opening a new course for disquietude—a contention within a contention—when the anxious public was relieved by the announcement that the Government, through the premier—Mr. Gladstone—had tendered its aid as mediator between employer and employé. This statement was made by the prime minister to the House of Commons on Monday evening, November 13. His letter addressed to the respective organizations of the mine-owners and miners was made public the following day as appended:

MR. GLADSTONE'S LETTER.

SIR: The attention of Her Majesty's Government has been seriously called to the widespread and disastrous effects produced by the long continuance of the unfortunate dispute in the coal trade, which has now entered on its sixteenth week. It is clear, from information which has reached the Board of Trade, that much misery and suffering are caused, not only to the families of men directly involved, but also to many thousands of others not engaged in mining whose employment has been adversely affected by the stoppage.

The further prolongation of the dispute can not fail to aggravate this suffering, especially in view of the approach of winter, when the greatly increased price of fuel is likely to cause distress among the poorer classes throughout the country. Moreover, the Government have little doubt that the effect of the stoppage on industry is rapidly extending and increasing, and that, unless an early settlement is effected, lasting, if not permanent, injury may be done to the trade of the country. The Government have not up to the present considered that they could advantageously intervene in a dispute the settlement of which would far more usefully be brought about by the action of those concerned in it than by the good offices of others; but, having regard to the serious state of affairs referred to above, to the national importance of a speedy termination of the dispute, and to the fact that the conference which took place on the 3d and 4th of November did not result in a settlement, Her Majesty's Government have felt it their duty to make an effort to bring about a resumption of negotiations between employers and employed under conditions which may lead to a satisfactory result.

It appears to them that advantage might accrue from further discussion between the parties of the present position of matters under the chairmanship of a member of the Government, who, it is hoped, will not be unacceptable to either side. Lord Rosebery has consented, at the request of his colleagues, to undertake the important duty which such a position involves. I have therefore to invite the miners' and the coal-owners' federations to send representatives to a conference to be held forthwith under his chairmanship.

In discharging this duty, it is not proposed that Lord Rosebery should assume the position of an arbitrator or umpire, or himself vote on the proceedings; but that he should confine his action to offering his good offices in order to assist the parties in arriving at a friendly settlement of the question in dispute.

I am, etc.,

W. E. GLADSTONE.

HOW THE PROPOSITION WAS RECEIVED.

It should be stated, for the information of those not wholly familiar with the English Government as at present constituted, that Lord Rosebery is Secretary of Foreign Affairs. His place, therefore, in Mr. Gladstone's cabinet is very nearly similar to that of Secretary of State in the Cabinet of the President of the United States. It appears that no man could have been selected whose personality was more pleasing to the parties in controversy and to the general public than Lord Rosebery. The representatives of the contending sides accepted without delay the invitation of the Government. On November 17, four days after the proposition had been made, the meeting was held, the matter temporarily settled, and the first steps toward arbitration and conciliation in the future taken. The terms can best be stated in a reproduction of the agreement signed, which is appended:

TERMS OF SETTLEMENT.

Terms of settlement of the coal dispute agreed upon between representatives of the Federated Coal-Owners and of the Miners' Federation of Great Britain at a conference held at the Foreign Office, on Friday, November 17, 1893, Lord Rosebery, K. G., the chairman.

(1) That a board of conciliation be constituted forthwith, to last over one year at the least, consisting of an equal number of coal-owners' and miners' representatives (fourteen of each). They shall before the first meeting endeavor to elect a chairman from outside, and, should they fail, will ask the Speaker of the House of Commons to nominate one, the chairman to have the casting vote. That the board, when constituted, shall have the power to determine from time to time the rate of wages at and from February 1, 1894, the first meeting to be held on Wednesday, December 13, 1893, at the Westminster Palace Hotel.

(2) That the men resume work at once at the old rate of wages until February 1, 1894. It is agreed that all collieries, so far as is practicable, be reopened forthwith, and that so far as is practicable no impediment be placed in the way of a return of the men to work.

We, the undersigned, chairman and secretary of the Federated Coal-Owners and of the Miners' Federation of Great Britain, on behalf of those represented at this conference, agree to the above terms of settlement of the present coal dispute.

Signed on behalf of the coal-owners,

A. M. CHAMBERS,
Chairman.
THOMAS RATCLIFFE ELLIS,
Secretary.

Signed on behalf of the Miners' Federation,

BENJAMIN PICKARD,
Chairman.
THOMAS ASHTON,
Secretary.
ROSEBERY,
Chairman of Conference.
H. LLEWELYN SMITH,
Secretary of Conference.

Thus came to an end the greatest industrial struggle England has ever known. Four months of disaster and the waste of $150,000,000, not to speak of starvation, bloodshed, and violence, is the verdict of one eminent authority as to the cost of the strife. In the general rejoicing over the termination of the conflict no one stops to ask, "Who has won, the masters or the men?" The fact that mills will reopen, work be furnished the unemployed, and fuel be cheapened is enough for the public. By the 1st of December practically all the miners will be at work, and in the meantime those who can not at once receive work will be supported by the continued contributions of their fellows. After next February arbitration, which has been the last resort of the most-favored nations in the settlement of disputes, will also decide questions at issue between the coal-miners of Great Britain and their employers.

THE INTERNATIONAL ASPECT.

No adequately correct estimate can be made of the immense damage to commerce the strike has occasioned. The loss to railroads in freight traffic alone gives but a faint idea. The Midland Railway, running through the heart of the mining district, fell off in traffic receipts $3,750,000 during the trouble, and the London and Northwestern Railway suffered a decrease in receipts of $2,080,000. As though to accentuate the fact that this falling off in business was caused by the coal strike alone, the Northeastern Railway, catering for the Durham and Northumberland collieries, which were not affected by the strike, increased its receipts during the same period $215,000. The strike has not been, however, without its lesson to political economists, journalists, and authors. Those thinkers who look ahead have been planning what should be done in the future should there be a recurrence of the conflict. In this connection, I take the liberty of quoting from Mr. I. Stephen Jeans's article "The Coal Crisis and the Paralysis of British Industry," appearing in the November number of the Nineteenth Century:

> It is not only that we are the losers of present trade and the sufferers of temporary misery and privation. That of itself would be bad enough, no doubt; but the evils that we deplore are much more than merely local or temporary. We are giving to our foreign competitors chances and facilities that they might never succeed in obtaining for themselves.
>
> It is a not uncommon error to suppose that England has the command of the cheapest coal in the world, and that we must necessarily retain our ancient supremacy from this point of view. Even if this supposition were perfectly true, there would still remain the serious damage done to our manufacturers by the temporary failure of our coal supplies over a large area. But the truth is that England does not now appear to have the command of such cheap coal as either Germany or the United States. This notable fact—the most fundamental and serious that can be imagined in reference to our industrial future—may easily be placed beyond doubt or controversy by an appeal to official figures that are presumably unaffected by sectional or selfish interests.
>
> For several years preceding the year 1888 the average value of the coal product of Germany at the mines was returned at a little over $1.33 per ton, and for the three years ending 1888 the average value of the coal output of the United Kingdom was returned at a little under $1.20 per ton. But since 1888 the average value of the coal output of the United Kingdom has been given as almost $1.93 per ton, whereas that of Germany has been only about $1.63 per ton. The rise in coal, however, has not been so remarkable as the recent rise in wages, which in the United Kingdom has been from 40 to 70 per cent above the datum line of 1887–'88 and in Germany has only been about one-half of that figure. Mr. A. M. Chambers, the president of the Coal-Owners' Federation, recently showed that the average wages paid to colliers and men employed in the underground working of Yorkshire pits was about $9.52 per week. On the other hand, a recent official German publication shows that in the principal coal fields of that country the average wages paid to full-grown underground workers in the second quarter of the present year was only 90 cents per day, or $5.40 per week. Under equal conditions Great Britain can produce quite as cheap, if not considerably cheaper, coal than any part of Germany; but for some time past the conditions have not been equal, and they have resulted in producing in our own country the dangerous

and disquieting result of what appears to be a permanently higher range of prices for fuel, which result, if continued, would carry with it a permanently higher cost of manufacturing operations—*cæteris paribus*, of course—and a consequent permanently disabled and disadvantageous position in the foreign trade of the world.

So far as the United States are concerned, we have to face the prospect of being permanently dislodged from our former supremacy of rank as a coal-producing country. In the virgin coal fields of that richly endowed country a miner produces almost twice as much coal in a day as is produced in England; so that, in spite of the payment of a higher average rate of wages, the United States have for some years past been producing coal at a cost not much exceeding one-half of that of many coal fields that are being worked at home. In other words, while the average value at the pit's mouth of the British coal output has been returned at $1.93 per ton or thereabouts for some years past, that of the United States, taken as a whole, for the census year 1890 was returned at about $1 per ton, and it is probably less even than that at the present time.

It is no doubt a far cry to the coal fields of the United States, and distance may lend enchantment to the view of their being unable to compete with our own. But this should not be too hastily assumed as impossible or even unlikely. Some cargoes of American coal have already been landed in England. The principal cargoes shipped from the United States to British ports are largely cotton and other commodities that can easily take large quantities of coal as ballast; so that if these commodities should by and by be produced alongside of each other—as they almost are to-day in the Southern States—we may easily see such supplies of American coal thrown upon the English market as will give us pause in our present ruinous and ghastly attempts at self-destruction. The margin is already a very narrow one. Many tons of heavy materials, such as pig iron and steel, have been shipped from this country to the United States at 60 to 85 cents per ton. If the same rate of freight could be got for American coal destined for British ports, our coal markets may soon be flooded with supplies from the coal fields of Virginia, Alabama, and Pennsylvania. The business would probably not be a "fat" one, and the Americans are flying at higher game as a nation than merely supplying other countries with the raw materials of industry. But it will be an evil case for England should the day ever arrive when coal can be mined upwards of 3,000 miles from our shores and landed at our very doors in successful competition with our own.

CLAUDE MEEKER,
Consul.

BRADFORD, *November 21, 1893.*

SUGAR PRODUCTION OF BRAZIL.

Pernambuco is the largest sugar-growing State in the country, and has been since sugar cane was first introduced for cultivation, in the year 1532 in the place now known as Olinda, a short distance from this city. In this consular district, also interested in sugar-growing, are the States of Parahyba, Rio Grande do Norte, and Ceará on the north, while on the south, bordering on a small part of Pernambuco, is the small State of Alagoas. These five States are not as large in area as the State of Bahia, which touches Pernambuco on the south. The whole of these five States, interested principally in the growing of sugar and cotton, are comprised within 35° and 41° west longitude and between 3° and 10° south latitude. The widest part of the State of Pernambuco, from north to south, bordering on the seacoast, is not more than 2½°, or 175 miles, while its greatest length from east to west is not above 6°. The area of the State is estimated at 78,000 square miles, or somewhat larger than the six New England States, or about the size of Kansas. Parahyba has about 45,000, Ceará 63,000, and Rio Grande do Norte and Alagoas each nearly 17,000 square miles. Thus these five States, where nearly all the sugar of Brazil is grown, have an area of nearly 218,000 square miles, while the State of Bahia has nearly 256,000 square miles. However, but a very small part of these States is under cultivation.

The following table gives the entries (kept by houses dealing in this commodity) of sugar into this port from the interior from 1875 down to September 1, 1893:

Brazilian sugar entered at Pernambuco.

Years.	September.	October.	November.	December.	January.	February.	March.
	Sacks.	*Sacks.*	*Sacks.*	*Sacks.*	*Sacks.*	*Sacks.*	*Sacks.*
1874-'75	25,701	118,714	227,423	217,449	229,682	201,266	160,914
1875-'76	34,034	105,813	198,873	137,522	128,378	93,973	66,513
1876-'77	11,799	81,934	202,542	233,696	215,120	163,393	120,137
1877-'78	1,577	35,934	138,259	221,568	198,262	145,303	139,847
1878-'79	1,921	35,934	167,104	245,486	244,299	151,839	106,219
1879-'80	4,151	47,723	267,584	314,089	277,282	233,298	209,525
1880-'81	21,308	128,759	308,836	418,650	372,123	317,417	297,958
1881-'82	8,801	121,557	323,656	425,465	382,492	329,384	229,529
1882-'83	1,474	55,227	202,594	253,341	214,833	177,308	135,491
1883-'84	91,797	276,930	386,151	391,695	364,283	287,138	170,627
1884-'85	19,506	140,803	307,226	348,033	300,530	229,061	173,725
1885-'86	15,545	128,419	283,845	293,679	192,800	151,863	110,514
1886-'87	32,849	191,783	391,953	337,623	273,865	243,881	193,243
1887-'88	49,136	240,478	482,794	495,168	433,472	285,727	224,158
1888-'89	25,701	237,169	390,225	359,828	305,807	163,232	113,622
1889-'90	31,073	187,241	268,457	262,857	226,041	170,959	143,310
1890-'91	22,099	204,803	273,461	406,622	315,700	284,874	236,721
1891-'92	11,949	142,235	383,334	385,796	343,100	229,178	160,541
1892-'93	19,855	126,453	309,898	349,228	251,293	205,839	188,755

Years.	April.	May.	June.	July.	August.	Total.
	Sacks.	*Sacks.*	*Sacks.*	*Sacks.*	*Sacks.*	*Sacks.*
1874-'75	109,474	47,259	18,155	5,165	1,804	1,363,006
1875-'76	35,810	17,979	3,888	634	2,294	825,711
1876-'77	87,958	54,682	23,853	5,858	620	1,201,592
1877-'78	94,981	63,147	23,517	11,012	1,358	1,074,765
1878-'79	61,619	32,817	6,592	1,517	592	1,055,938
1879-'80	168,942	108,598	53,596	25,354	6,491	1,716,637
1880-'81	181,187	115,783	46,820	12,071	3,861	2,224,773
1881-'82	122,659	66,903	15,398	2,703	942	2,029,489
1882-'83	80,478	58,858	25,878	11,068	13,029	1,229,579
1883-'84	103,015	56,847	14,461	5,188	2,006	2,150,138
1884-'85	75,316	41,592	18,478	6,365	1,252	1,661,887
1885-'86	60,652	34,255	13,476	6,608	5,329	1,296,985
1886-'87	123,972	100,085	48,895	25,198	7,869	1,971,216
1887-'88	145,436	83,657	37,448	10,321	5,570	2,493,365
1888-'89	70,066	35,726	11,694	6,039	7,353	1,726,462
1889-'90	99,256	52,633	25,102	12,714	8,957	1,488,600
1890-'91	173,010	87,974	52,705	23,388	8,251	2,089,608
1891-'92	100,750	48,859	14,507	7,783	7,323	1,835,355
1892-'93	133,812	95,500	43,508	24,928	19,407	1,768,476

It is difficult to ascertain whether the acreage under cultivation has increased or diminished during the last five years, or, in fact during the years specified in the foregoing table, commencing with 1874–'75. This is owing to the fact that the cane is planted in patches along moist, marshy, and desirable places best adapted for its growth. Large fields are not plowed and tilled as with us for the raising of wheat or corn. The only method of discovering the acreage of sugar under cultivation in this district is by making an estimate based upon the number of tons manufactured from an acre of cane. The character of the season greatly affects the quantity produced from the same patch of land. A season with abundance of rain will give a greater output from the same number of acres than will a season with less rain. Therefore, it is extremely difficult to ascertain what acreage is now under cultivation, and whether or not the number of acres cultivated has increased during the last five years. But a slight increase is to be assumed, especially during the last three years, because sugar seems to have demanded a better price by reason of the depreciated currency in this country; and agriculturists are said to have taken pains to increase their acreage.

As may be observed from the table of entries of sugar to this port since 1875, the greatest number of sacks for any one crop year was in that ending September 1, 1888—2,493,365 sacks, equal to 187,002 tons, allowing 75 kilograms to the sack. From the best information given, it is estimated that it requires in this State (Pernambuco) 10 tons of cane to produce one ton of sugar of what is known a "assucar bruto," or Pernambuco brown sugar. Of white sugar it is said to require from 18 to 20 tons of cane to one ton of sugar. It is also estimated that 12.3 tons of cane, when the season is favorable, can be obtained from one acre of ground. This being the case, I find that in the year referred to (1887–'88) there were under cultivation 149,595 acres. This calculation is based upon the entries of the amount brought into this city or port; but, of course, taking into consideration the amount consumed in the State, of which we have no record, the number of acres under cultivation must have been much greater than is here given.

Taking the first of the five years about which information is solicited—1888–'89—I find that there were 1,726,462 sacks entered, and, calculating this in the same manner as before, but 105,272 acres of cane were under cultivation. For the year 1889–'90 the entry is given as 1,488,600 sacks, which would mean, on the same basis, an acreage of 90,687. For the crop year 1890–'91, with a record of 2,089,608 sacks entered, there would show 127,415 acres. For 1891–'92—1,835,355 sacks—the acreage was 111,091. For the last of the five years—the year ending September 1, 1893—1,768,476 sacks are reported as having been entered in this city. This would mean, on the same basis, that 107,834 acres were under cultivation. As may be observed, the highest number of sacks of sugar within the last five years was in the year 1890–'91—2,089,608 sacks—and the lowest number of sacks entered within the same time was in the year 1889–'90—1,488,600, or a difference of 601,008 sacks. The difference in acreage between these two years was 36,728 acres. Now, it is not probable that the number of acres of cane planted in 1890–'91 was 36,728 less. It is more probable that the number of acres increased, rather than diminished, but that the condition of the season in one year was more unfavorable than in the other. This calculation as to the number of acres leaves out, it may be, a larger acreage of sugar cultivated for home consumption in any one year than is here specified, according to the figures, which are based upon the entries into this port.

Below is given a table showing the entries into this port for the last five years and the number of acres under cultivation each year, based upon those entries, calculating one ton of sugar to 10 tons of cane and 12.3 tons of cane to the acre.

Sugar entries at Pernambuco and estimated acreage under cultivation.

Crop years.	Entries.	Acreage.
	Sacks.	*Acres.*
1888–'89	1,726,462	105,272
1889–'90	1,488,600	90,687
1890–'91	2,089,608	127,415
1891–'92	1,835,355	111,091
1892–'93	1,768,476	107,834
Total	8,908,501	542,299

Regarding the methods of preparing for the market, as far as I can learn, there appears to be no change. Sugar factories are located in close proximity to the sugar-growing districts where it is most convenient to sugar-cane growers to send their product, many of them selling it outright, while others have the cane ground for their own account. Many of those growers more remote from the factories have machinery of their own for grinding the cane. The same methods for the manufacture of sugar from the cane prevail in the other States of this consular district—Çeará, Rio Grande do Norte, Parahyba, and Alagoas. Of these four States, Alagoas, of which Maceió is the principal seaport town, exports the largest quantity of sugar. I give the figures in this connection as furnished by Messrs. Boxwell, Williams & Co., who have a house there and also in this city:

Years.	Quantity.	
	Bags.	*Tons.*
1888–'89	572,945	43,915
1889–'90	430,329	30,647
1890–'91	559,014	43,350
1891–'92	495,508	35,287
1892–'93	524,112	36,905

Regarding the quantity shipped from Ceara, Rio Grande do Norte, and Parahyba, I have as yet obtained no statistics, and, I might add, the quantity of sugar raised in each of those three States is comparatively small; however, as soon as I obtain any statistics from the parties to whom I have applied, I shall forward them.

As to the question of acreage under cultivation in Alagoas, calculating upon the same basis upon which was estimated the acreage in this State, the result shows that during the last five years there were 154,665 acres. This gives an average of 30,933 acres for each year. Of course, this comprises only the number of acres under cultivation as based upon the amount shipped from Maceió, according to the figures above given, no estimate being made of the additional number of acres that were required to furnish sugar for home consumption.

The following statement shows the countries to which the sugar was shipped from Pernambuco and Maceió during the five years 1888–'93:

Sugar shipments from Pernambuco and Maceió.

Years.	Shipped to—			
	United States.	Canada.	Great Britain.	Brazilian ports.
Pernambuco.	*Bags.*	*Bags.*	*Bags.*	*Bags.*
1888–'89	517,237	162,836	254,347	791,813
1889–'90	140,510	18,800	70,808	1,258,307
1890–'91	634,270	83,817	170,792	1,189,525
1891–'92	496,376		207,160	1,131,729
1892–'93	314,755		131,987	1,321,724
Maceió.				
1888–'89	209,435		347,002	26,488
1889–'90	108,000		155,993	166,366
1890–'91	317,053		127,891	241,961
1891–'92	302,560			192,948
1892–'93	298,783		71,609	153,720

DAVID N. BURKE,
Consul.

PERNAMBUCO, *October 23, 1893.*

A NEW ELECTRIC ROAD CARRIAGE.

A new application of electricity as motive power for carriages used on public highways having been witnessed by me in the city of Rheims, I shall endeavor to describe the vehicle and its construction.

The first application of electricity to this mode of locomotion dates back to 1881, when the late Gaston Planché, a Frenchman, made the first experiments, which, however, proved unsuccessful at that time, principally on account of the imperfection of the sheets used, which were lacking in energy, strength, and durability. In 1888 Mr. Immisch built in London, for the Sultan of Turkey, an electric dogcart resembling the dogcart of Mr. Magnus Volt, of Brighton, at a cost of 5,000 francs. The battery used in this dogcart was sufficient to propel it during five hours at a speed of 16 kilometers per hour (9 miles 1,484 yards). The battery weighed 350 kilograms (770 pounds) and the whole vehicle ready for the road, exclusive of passengers, weighed 575 kilograms (1,243 pounds). The motor used was the "motor Immisch," of one-horse power, which, in its full capacity, absorbed from 20 to 25 ampères and 46 volts, or from 1,000 to 1,200 electric watts.

The latest electric carriage is that of Mr. Paul Pouchain, of Armentières, department of Nord, France, and it is considered as the solution of the problem studied for many years by the French electricians.

This carriage is a six-place phaeton built on four wheels. All its upper part is movable, so as to facilitate the inspection and care of the condensers and electric motor. The electric current is furnished by a battery of condensers "Dujardin" composed of six boxes of nine elements, or altogether, fifty-four elements. Each box is 44 centimeters (17 inches) in length, 33 centimeters (14 inches) in width, and 31 centimeters (13.6 inches) in height.

Each element contains one positive and two negative sheets inclosed in a box of ebonite. The nine elements are coupled together in tension and always in the same manner. The recipient containing the elements is hermetically closed with a piece of ebonite, and the lower part of the lid is covered with a thin piece of rubber one millimeter (three one-hundredths of an inch) thick and extending outside about one centimeter (three-tenths of an inch). When the lid is placed on the box, the rubber is thrown up and hermetically closes the element. Thus each element can be easily inspected, examined, and kept in good condition. The nine elements are inclosed in a box made out of pitch pine, forming thus six batteries entirely independent and communicating through twelve wires (two in each box) to the commutator. The commutator, made out of bronze, is a cylinder in the shape of a dodecagon, on ten sides of which are placed pieces of copper electrically insulated from the body of the commutator and connected together in a permanent manner. In using a lever the commutator turns and can be placed in five different positions establishing contacts between the pieces of copper and fourteen elastic jaws communicating through twelve wires to six batteries and through two wires to the motor. The following are the connections made by the commutator in its five positions:

Position at rest.—All the condensers, circuit disconnected. Motor in short circuit putting on the brake for stoppage.

Position of first speed.—The six batteries placed in derivation on the motor (17 volts).

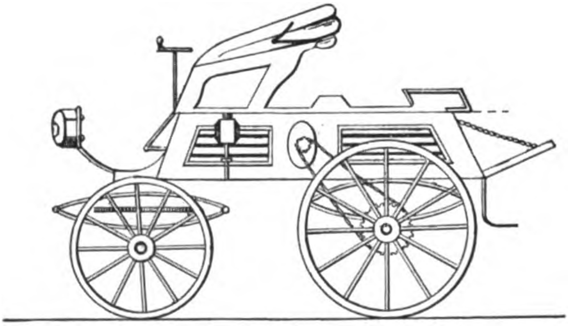
Position of second speed.—Three batteries of two elements on tension (34 volts).

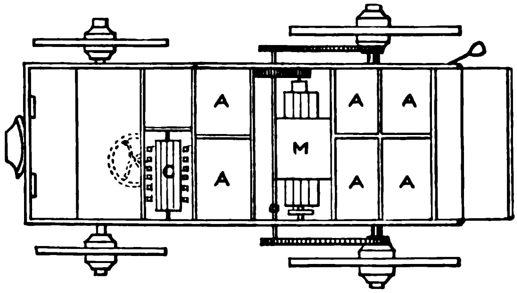
Position of third speed.—Two batteries of three elements on tension (50 volts).

Position of fourth speed.—The six batteries on tension (100 volts).

The motor is of the system "Rechniewsky," of a normal energy of 2,000 watts, able, when necessary, to develop as much more. It is placed in the center of the carriage, and, by the means of a Vaucanson (endless) chain, puts in motion a shaft revolving on the system of differential motion.

ELECTRIC CARRIAGE OF MR. POUCHAIN.





A. Accumulators. C. Commutator. M. Motor.

Over the back wheels are placed four batteries of accumulators or condensers, the motor and the differential system controlling the wheels; under the front seat are the two other batteries, a commutator coupler, and a tool box. On the dashboard is an electrometer, a disconnecter, an interrupter of the lights placed in the three lanterns, and an interverter to back the carriage.

Under the vehicle are found soft wires, which can be connected with a stationary dynamo for the purpose of reloading the batteries. The mechanism for guiding the carriage is applied to the fore part of the carriage, to which is added a screw wheel put in motion by an endless screw ending under the hand of the driver and of very easy management.

This carriage, all ready to work, weighs 1,350 kilograms, or 2,970 pounds, and carries six passengers. On a pavement in an average condition 70 kilometers (42½ miles) can be covered at a speed of 16 kilometers (9 miles 1,484 yards) per hour without reloading the batteries, and the carriage can be turned entirely around on a street less than 4 meters (13.1 feet) wide.

On a level and on an average pavement the usual speed naturally depends on the number of accumulators, the greatest speed—16 kilometers (9 miles 1,484 yards) per hour—being furnished by using six batteries on tension.

HENRY P. DU BELLET,
Consul.

RHEIMS, *December 20, 1893.*

MEXICAN EXPORT DUTY ON WOODS.

I transmit herewith a copy of a federal decree published in the Diario Oficial of the 12th instant imposing an export duty on national (native) woods of Mexico, for certain uses, to take effect January 1, 1894.

ISAAC P. GRAY,
Minister.

MEXICO, *December 20, 1893.*

The Congress of the United Mexican States decrees:

ARTICLE 1. National woods for construction, cabinetmaking, and dyeing purposes, the same as foreign woods in transit within the waters of this Republic, are hereby subject to export duty.

ART. 2. The export duties on construction and cabinet woods will be calculated on each cubic meter contained in the exporting vessel, the rate to be $1.50.

ART. 3. To determine the number of cubic meters on which the tax should be imposed, as per previous article, the vessel's gross tonnage, as shown by its matriculation certificate, is to be taken as a basis, multiplying said tonnage by 2.83 meters, which is the measure of tonnage, in accordance with the provisions of the regulation of October 7, 1878. Of the product obtained from this multiplication an allowance of 40 per cent has to be made for spaces or interstices, which, although included in the gross tonnage of a vessel, can never be filled out with wood.

ART. 4. Whenever the custom-houses may have a well-founded motive for suspecting the inexactness of the matriculation certificate, they will request of the captain of the port the measurement of the vessel's dimensions, in accordance with the rules established by the regulation of the 7th of October, 1878, or its substance, excepting what in each particular case may be provided for by treaties.

ART. 5. Whenever the exporters wish to load also the deck of the vessel, they shall notify the custom-houses from which the vessels are to be dispatched, so that the authorities of the port may proceed to calculate the cubic meters contained from the deck to the upper works, deducting the open spaces, which, according to the law, have to be deducted when computing the ship's net tonnage. The number of meters resulting from this computation will be added to the result obtained from the calculation spoken of in article 3.

ART. 6. When in a port of entry a shipment of woods and other merchandise is made, or whenever in said port merchandise is shipped and the vessel shall leave for a coasting-trade port or other point along the coast to take in a shipment of wood, the custom-house shall measure the space occupied by other merchandise, and the number of cubic meters resulting from this measurement will be deducted from the number which is to form the basis on which duties are to be paid.

ART. 7. When in a port of entry a shipment of woods and other merchandise is made and the space occupied by both does not exceed 50 per cent of its gross tonnage, the duty on woods will be calculated on the number of cubic meters of wood measured at the loading place before the shipment is made.

ART. 8. The exportation charges on dyewoods will be calculated on the ton of 1,000 kilograms. The rate on dyewood or campeachy will be $1.50, on mulberry (moral) 75 cents. The department of the treasury will regulate the manner in which the duties are to be collected.

ART. 9. Shipments for exportation of construction woods and dyewoods may be made either at the ports of entry or at the coast ports. In the ports of entry where there are moles and whenever vessels can get alongside of such moles a shipment can only be made on the side of such moles. For a coast-port shipment permission from the proper custom-house is required, having previously paid and given security for the amount of duties.

TRANSITORY ARTICLE. This decree shall be in force on the 1st day of January, 1894.

BUDGET OF THE GRAND DUCHY OF LUXEMBURG.

I inclose a copy of the budget of the Grand Duchy of Luxemburg for the year 1894.

As it is frequently stated in Europe that the costs of government are higher in republics than in monarchies, it has occurred to me that political economists may find something of interest in a comparison of the totals and details of this budget with the receipts and expenses of the State of Rhode Island, which most nearly approximates the Grand Duchy of Luxemburg in area and population. In both area and population Rhode Island surpasses Luxemburg, the ratios being 5 to 4 and 5 to 3, respectively. It is true that Rhode Island has no receipts from customs duties and no expenses caused by representation abroad. But Luxemburg's customs duties merely take the place of an inland tax, and the cost of its foreign representation is small (diplomatic service $5,000 and consular service $1,300).

The comparison may be of further interest as showing the sources of revenue and the objects of expense in this little country, which, through its neutrality, is relieved from the costs of offense and defense that burden its more powerful neighbors.

GEORGE H. MURPHY,
Vice-Commercial Agent.

LUXEMBURG, *December 5, 1893.*

[Inclosure.]

BUDGET OF THE GRAND DUCHY OF LUXEMBURG FOR THE YEAR 1894.

Brief statement.

	Francs.
Estimated receipts, inclusive of surplus brought forward from 1893	8,877,061
Estimated expenses	8,726,012
Nominal surplus	151,049
Surplus brought forward from 1893	1,259,000
Receipts in 1894 (estimated)	7,618,061
Estimated amount available in 1894	8,877,061
Estimated expenses in 1894	8,726,012
Estimated receipts in 1894	7,618,061
Estimated receipt deficit	1,107,951

Detailed statement of estimated receipts and expenses in 1894.

RECEIPTS.

		Francs.
Surplus from 1893		1,259,000
Direct contributions and excises:		
Land tax	965,000	
Tax on personal property, patents	835,000	
Tax on mines and mining	85,000	
Tax on public houses	180,000	
Tax on brandy, domestic and imported	210,000	
Tax on beer	110,000	
Other small taxes	8,900	
		2,393,900
Customs duties		2,340,000
Registration and domains		1,503,961
Post, etc.:		
Postal service	650,000	
Telegraph service	48,000	
Telephone service	72,000	
		770,000
Prisons, almshouses, etc		191,000
Sundry receipts, interest, etc		419,200
Total of receipts		8,877,061

EXPENSES.

		Francs.
Civil list		200,000
Government (salaries of ministers, etc.)		144,850
Chamber of Deputies		33,700
Council of State		17,000
Grand Ducal secretaries		12,300
Foreign affairs:		
Legations	25,000	
Consulates	6,500	
Extraordinary expenses	7,600	
		39,100
Administration of justice		372,100
Religion:		
Roman Catholic	402,700	
Protestant	3,100	
Israelite	3,100	
		408,900
Gendarmerie and volunteers		400,400
Chamber of the counties		36,300
Tax office (salaries, etc.)		18,400
Direct contributions and excises (salaries, etc.)		367,400
Registration and domains		146,400
Customs service		56,700
Savings fund		23,000
Pensions		512,000
Public works:		
Administration		202,000
Works on roads, railways, etc		595,000
Repairing of palace, improvement of property, etc		253,822
State property at Luxemburg		46,000
Mines		34,600
Communal works		415,000
Public debt (annuities, interest, etc.)		746,800
District commissariat		35,500
Administration of forests		43,500
Sanitary service		264,565
State establishment "Mondorf-les-Bains"		43,000
Post, telegraph, and telephone services		955,450
Agriculture		535,800
Commerce and industry		64,000
Higher education		290,000
Primary education		530,450
Arts and sciences		47,375
Prisons and almshouse		243,400
Hospitals and orphan asylum		254,500
Public beneficence, etc		111,100
Police, general and administrative		144,900
Incidental expenses		30,700
Other expenses		50,000
Total of expenses		8,726,012

LEAVES OF TREES AS FODDER.

Scarcity of hay is compelling European farmers to feed leaves to their cattle. France leads in this movement. The French recommend exclusively the leaves of the hazel, aspen (trembling poplar), ash, elm, and willow. The yield of the leaves of these trees to a 100 parts is:

Kind.	Protein.	Extracts.	Wood pulp.	Ashes.
Aspen	4	26.7	7.3	2
Ash	4.4	26.3	5.5	3.8
Elm	4.7	24.6	7.6	3.1
Willow	4.9	25	7.4	2.7
Hazel	5.8	26.3	5.8	2.1

The leaves, after being gathered, are spread on the barn floor to the depth of 3 to 4 inches, and are turned once a day. They dry in from three to five days, according to the weather. When dry they are piled up ready for use. It is profitable, before serving, to prepare each day's supply twenty-four hours beforehand. There is mixed with the leaves to be served each day a small amount of chopped-up turnips, leaving the whole to ferment. Just before feeding, clover hay or lucerne is sometimes added. This food has been found especially good for milch cows.

Young shoots and branches of trees with their new leaves are picked off every five years and fed to sheep. These animals are very fond of the aspen because of its resinous and sweet buds. Willow leaves and bark mixed with oats are regarded as a very pleasant, nutritious, and strengthening food for horses.

It is not good to feed the leaves green; in fact, the cattle prefer them dried. Again, they should be served only with other fodder. The bitter and astringent juices, even in the dry leaves, unfit them for wholly taking the place of hay or other foods; they are a good auxiliary, especially at a time when other foods are dear. When the leaves are young they contain a large quantity of nitrogen. As the season advances this grows less, as do also their nourishing properties. When to begin to harvest the leaves is therefore an important point. Farmers who have experimented say that July and August, when the leaves are full grown, is the best time.

Experiments were made with potato leaves, but the results were unsatisfactory. They should be used only in times of the greatest scarcity, and only then to save the live stock. The potatoes, robbed of their leaves, suffer much more than is made up by their leaf value for fodder.

All this trouble in Europe is taken to find substitutes and to save cattle, and yet 2,000,000,000 bushels of the best food for man and beast burden the granaries and barns of the United States. Why do not the European farmers take our maize? It is infinitely better than their best substitute, is one-third as dear as rye or wheat, and, in the testimony of their own chemists, almost as nutritious; though twice as dear as potatoes, it is more than four times as nutritious.

One of the best-posted Germans in Chemnitz, a man who spent ten or more years in the United States, tells me that the "Germans do not know enough about maize; it needs agents all over the Empire with patience enough to see the thing take root slowly." The efforts now being made by the Department of Agriculture should be supplemented by a combined effort of the States likely to profit by the introduction of maize into Europe.

J. C. MONAGHAN,
Consul.

CHEMNITZ, *November 20, 1893.*

IMMIGRATION INTO VENEZUELA.

I inclose a copy and translation of a contract for the introduction of 200,000 immigrants into Venezuela. Since the accession to power of the present Executive he has shown that he is fully alive to the importance of increasing the population of the Republic. In a former dispatch I forwarded the exhaustive law and the supplementary decree upon the subject of immigration. Since then various contracts have been made with different parties, but until now none of sufficient importance to attract attention. The present contract is, however, of a very different character, involving the founding of thirteen new cities, three of which, in Guayana, will have not less than 50,000 inhabitants each.

It will be interesting to note what success will attend this experiment of colonization on so large a scale.

E. H. PLUMACHER,
Consul.

MARACAIBO, *November 7, 1893.*

IMMIGRATION CONTRACT BETWEEN THE GOVERNMENT OF VENEZUELA AND JOSÉ BOCCARDO, A MERCHANT RESIDING IN CARACAS.*

[Translation.]

ARTICLE 1. José Boccardo binds himself to form in Europe a syndicate to organize a joint-stock company with an effective capital of not less than 50,000,000 bolivars, in order to comply with the present contract.

ART. 2. He binds himself to bring to the Republic of Venezuela within four years, counting from the expiration of one year after the approval of this contract by the national Congress, 200,000 immigrants of the following European nationalities: French, Spanish, Belgian, Swiss, north of Italy, Canary Islands, and the Azores, under the conditions required by the law upon the subject.

(1) The introduction of 200,000 immigrants will be effected by the contractor bringing into the republic 50,000 during each year of the four years specified.

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*NOTE BY THE DEPARTMENT.—This contract is given, not with literal, but with substantial, exactness.

(2) * * * The immigrants * * * shall not absent themselves from the country before the expiration of eighteen months from the time of their arrival, the Government having power to compel them to remain during that period, unless, indeed, they shall pay into the treasury the amount of money given as bonus to contractors for their introduction.

ART. 3. The contractor binds himself to found simultaneously within the territory of the section Guayana, of the State of Bolivar, and in the localities determined by agreement between the Government and the contractor, three cities, dedicating 50,000 immigrants for the population of each.

ART. 4. The contractor likewise binds himself to found with the remaining 50,000 immigrants, and in the east, center, and west of the Republic, ten cities of 5,000 immigrants each.

[Articles 5, 6, 7, 8, 9, and 10 give in great detail the character of the cities which the contractor agrees to build, the public buildings he will erect, etc.]

ART. 11. In order to facilitate the transmission of the 50,000 immigrants destined to the ten cities of 5,000 inhabitants each, the Government will designate the ports for their disembarkation in the east, center, and west of the Republic, the contractor being authorized to make use of the immigrant depots now existing for a period of fifteen days.

ART. 12. The Government, having approved the plans and estimates of the works to be constructed by the contractor, as well as the reports and estimates respecting rebuilding and repairs, will appoint an inspector for each of said works, whose salary will be paid by the contractor.

ART. 13. The Government will pay to the contractor for each immigrant the fares by sea and land established by articles 87 and 89 of the recent immigration and colonization law of February 23 of the present year; also the expense of maintenance for thirty days, according to articles 11 and 83 of the laws of January 7 and February 23 of this same year. Besides, considering the especial circumstances of the case and the enormous expense for transmission and installation which must be confronted from the arrival of the immigrants until reaching their final destination, the Government concedes an extra amount of 40 bolivars* for each person from 12 to 60 years of age, and 22½ bolivars for each person between 3 and 12 years. It is understood that in no case and under no circumstances can the contractor demand a greater amount than that herein indicated.

ART. 14. The contractor can not make any previous stipulation with an immigrant respecting occupation or salary, or which in any way binds the immigrant before his arrival in the country, and any agreement of the kind will be null and void.

ART. 15. For the payment to the contractor of the sum fixed for each immigrant the Government will issue "immigration bonds" of the value of 500 bolivars ($97.50) each, bearing from the date of issue a yearly interest of 6 per cent. The sum necessary for the payment of interests and sinking fund will be taken from the *fomento* reserve.

ART. 16. The interests upon the immigration bonds will be deposited by the Government by completed quarters in one of the banks of the city of Caracas. This deposit of interests will begin from the date of the issue of the bonds in annual parts corresponding to the number of immigrants arriving during the year.

ART. 17. The Government will set aside one-half of one per cent of the circulating capital in bonds as a sinking fund, this to be effected by quarterly drawings or auctions, at the pleasure of the Government, which also has power to increase the sinking fund.

ART. 18. The Government having official notice of the arrival of immigrants at their destination, it will pay in this city and in immigration bonds the corresponding amount due the contractor. The receipt of the immigrants shall be according to the special law upon the subject.

ART. 19. The Government will concede to the contractor 5 hectares (12.355 acres) of public land for each immigrant brought to the country, subject to the conditions and terms established by the law upon the subject, and in the sections where the new cities are to be established. In case that in any of the localities where the cities are to be constructed there are not sufficient public lands to cover this concession, any public lands near by may be taken; and should there be none even of these, the contractor must be satisfied with the existing quantity, with no right of future reclamation.

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*1 bolivar=19.3 cents in American gold.

ART. 20. On each side of the railways constructed by the contractor agreeably to this contract a strip of public lands (should there be any) 500 meters wide shall be measured, and this will be divided into lots of 500 meters square belonging alternately to the Government and to the contractor.

ART. 21. In case the Government should desire to sell its alternate lots indicated in the foregoing article, the contractor shall have the preference of purchase, circumstances being equal, no matter who may wish to buy.

* * * * * * *

ART. 23. During the period of twenty-five years counting from the approval of this contract by the national Congress, the Government declares free from all national imposts the railways constructed by the enterprise, including the 5 per cent tax recently established upon net gains.

ART. 24. The contractor has the right to work the mines he may discover in the public lands ceded to him, complying with the requisites established by law.

ART. 25. The duration of this contract will be fifty years, counting from the day of installation of the 200,000 immigrants, at the expiration of which the nation will assume property rights, with no obligations whatever to remunerate the contractor, in all the public works and buildings constructed, the contractor retaining only the railways and private houses, which will remain entirely subject to the dispositions of common law.

ART. 26. During the specified fifty years the contractor will recover the municipal rates of the new cities, and in the new ports where he constructs wharves and depots he will collect wharf and warehouse dues, all according to the tariffs established by mutual agreement between the contractor and the Government and to the regulations promulgated by the latter.

ART. 27. In no case may the contractor recover from the Government rentals for the buildings occupied as public offices, nor for any use made of the wharves, warehouses, or any other public constructions.

ART. 28. The Government, in accord with the contractor, will fix the passenger and freight tariffs of the railways constructed by the latter, who is obliged to transport the mails free of charge, and to recover from the Government only one-half of the regular tariff for national employés and soldiers in active service.

ART. 29. During the fifty years indicated in article 25 the contractor, through employés appointed by the Government, will satisfy all the costs of administration of the new cities and ports in all branches, except treasury employés and troops, according to estimates agreed upon by the Government and the contractor.

ART. 30. The Government concedes to the contractor the right to introduce, free of duty, through the custom-houses of the Republic materials of construction, tools, machinery, and effects necessary for the execution of this contract, according to the plans and estimates approved by the Government for the construction of buildings, wharves, railways, aqueducts, systems of lighting, telegraphs, and telephones, complying in each case with the requirements of law. In order to secure this exemption, the contractor will present a detailed statement in conformity with the dispositions of the ruling treasury code. Materials which are made or produced in the country will be excepted from this exemption.

ART. 31. The exemption referred to in the foregoing article will remain in force only twenty-five years, counting from the approval of this contract.

ART. 32. During the period of twenty-five years the Government will also concede to the contractor the right to use the La Guayra mole and to transport over the railways upon which the Government enjoys a decreased tariff of freight and passage materials, tools, etc., as well as the immigrants and company employés, as though they pertained to the Government, paying only what the Government itself should pay according to its contracts.

ART. 33. The Government will arrange for the reception of the immigrants at the ports of disembarkation in conformity with the ruling immigration laws.

ART. 34. The employés, workmen, and other individuals occupied in the works referred to in this contract, and in their preservation and administration, will be exempt from military service during this contract, except in case of foreign war.

ART. 35. During the present contract the Government will not permit any other person or company to establish railways, telephones, public lighting, or aqueducts for drinking water which may in any way be prejudicial to the enterprises established by the contractor in conformity with the basis of the present contract.

ART. 36. In case of unavoidable delay in the execution of this contract, the contractor will be conceded a prolongation of time equal to that thus lost.

* * * * * * *

ART. 40. The present contract may not be transferred in whole or in part to any foreign government, but it may be to another person or company, the Government consenting.

ART. 41. The doubts or controversies which may arise in the understanding or execution of this contract will be resolved by the tribunals of the Republic, in accordance with its laws; but in no case may they give rise to international reclamations.

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CHILE'S MINING AND METALLURGICAL EXHIBITION, 1894.

There will be held a mining and metallurgical exhibition in Santiago, April, 1894.

The advantages offered to manufacturers and business men in the United States interested in the special lines called for exhibition are manifest, and their coöperation is important, with the view of extending our commerce with Chile.

I especially call attention to paragraph 5 of the regulations of the exhibition, wherein the directive committee generously offers to defray all cost of freight by sea and land both for the arrival and the return of the object exhibited, as well as the passages of the workmen and laborers that are sent to the country for installing and working the machinery and apparatus to be exhibited.

JAMES M. DOBBS,
Consul.

VALPARAISO, *December 27, 1893.*

MINING AND METALLURGICAL EXHIBITION TO BE HELD IN SANTIAGO DE CHILE IN 1894.

Number 97. Whereas Congress has approved the following project of law:

The amount of $150,000 is conceded for the object of organizing a mining and metallurgical exhibition, which is to take place in Santiago in 1894.

The President of the Republic will decree the regulations necessary for the organization of the said exhibition.

And whereas, having approved and sanctioned this project after consultation with the council of state, let it be promulgated and enacted.

Santiago, 2d of September, 1893.

JORJE MONTT,
President of the Republic.

VINCENTE DÁVILA LARRAIN,
Minister of Public Works.

PROGRAMME OF THE EXHIBITION—ORGANIZATION IN SANTIAGO.

The department of industry and public works of the Republic of Chile has issued the following decree:

SANTIAGO, *September 11, 1893.*

No. 1330.

The law No. 97 of the 2d instant granted the sum of $150,000 for organizing in this capital a national mining and metallurgical exhibition to be held in 1894. In order to comply with the prescriptions of said law, I have resolved and decree:

ARTICLE 1. During the second fortnight of April, 1894, a mining and metallurgical exhibition will be opened in the Quinta Normal de Agricultura, in the localities which are being prepared for this purpose.

The days of the opening and closing of the exhibition will be fixed by this department.

ART. 2. The exhibition will contain the following sections:

First section—Motive power.

(*a*) Steam, petroleum, and gas engines.

(*b*) Pelton's or other similar turbines for the working of small quantities of water falling from great heights.

Second section—Electricity.

(*a*) Dynamos for the transmission of mechanical force, for lighting and electrolysis.

(*b*) Electric motive power and electric hoists.

(*c*) Electric drills.

(*d*) Tubs for electrolysis and materials employed in their manufacture.

(*e*) Pumps and special injectors for working electrolytes.

Third section—Extraction machinery.

(*a*) Extraction and hoisting engines.

(*b*) Air-compressing machines.

(*c*) Drills driven by compressed air, of all classes.

(*d*) Augurs or drills for sounding.

(*e*) Mining pumps.

(*f*) Tools and accessories used in mines, salvage and ventilating apparatus, lamps, etc.

(*g*) Strong explosives for mines.

(*h*) Apparatus for carrying and shipping minerals, aërial ropes, portable railways, wire-rope tramways, etc.

Fourth section—Mechanical preparation of minerals.

(*a*) Crushers, pulverizers, and stamp mills.

(*b*) Concentration machines worked by wind and water power; separators.

Fifth section—Metallurgy.

(*a*) Blast furnaces, calcination and baking furnaces.

(*b*) Metallurgical and industrial mode of working copper, zinc, lead, and tin, with appropriate machines.

(*c*) Small installations for the treatment of copper by water.

(*d*) Small installations for separating ore containing gold by means of mercury and cyanide of potassium.

(*e*) Proceeds of lixiviation.

Sixth section—Chemical industries.

(*a*) Mode of producing sulphuric acid, Barbier's apparatus, etc.
(*b*) Apparatus used for working nitrate, other salts, and iodine.
(*c*) Laboratory utensils and reactives.

Seventh section—Statistics and plans.

(*a*) Scientific instruments used in the mining industry.
(*b*) Plans.
(*c*) Models.
(*d*) Catalogues.
(*e*) Statistical summaries.

Eighth section—Productions of the working of mines and metallurgy.

(*a*) Collections or specimens of rocks, minerals, ornamental rocks, hard rocks, rock and other mineral salts, earths and clays, various mineral products, native sulphur.

(*b*) Mineral and vegetable combustibles, coal (residues and blocks), asphalts and asphaltic rocks, graphite, mineral tar, petroleum in native state.

(*c*) Metals in native state—copper, lead, silver, zinc, etc.

(*d*) Productions by working metals in native state.

ART. 3. Anyone, whether Chilean or foreigner, can participate in the exhibition by complying with the rules that will be enacted for the purpose.

ART. 4. The Government will transport free of charge to the grounds of the exhibition all the exhibits included in the preceding classification.

The Government will also defray the expenses of the land and sea journeys to and from Chile of the workmen and laborers that are sent by exhibitors for installing and working the machinery and apparatus to be exhibited.

ART. 5. The importers of objects to be exhibited will sign bills for the value of the duties, payable at twelve months date, said bills to be canceled if the exhibits are reshipped to foreign parts within the period mentioned. Otherwise they are liable for the respective duties.

ART. 6. There will be three classes of prizes, to consist of first, second, and third class medals, which will be adjudged, together with a diploma signed by the minister of industry and public works and by the president and the secretary of the National Mining Society.

ART. 7. The board of directors of the National Mining Society shall take charge of the organization of the exhibition, the minister of industry and public works presiding when present at the meeting.

ART. 8. The committee of directors of the exhibition shall draw up the necessary regulations, which will be submitted to the Government for approval before coming into force.

MONTT,
President of the Republic.

V. DÁVILA LARRAIN,
Minister of Public Works.

REGULATIONS OF THE EXHIBITION.

SANTIAGO, *September 14, 1893.*

In view of the preceding note, I have approved and decree the following regulations for the mining and metallurgical exhibition:

(1) In view of the regulations of article 7 of the supreme decree of the 11th instant, the board of directors of the National Mining Society shall have charge of the reception of the exhibits, both native and foreign. The board of directors shall adopt the measures calculated to encourage Chileans and foreigners to participate in the exhibition in accordance with the classification established in the said supreme decree.

(2) The foreigners who wish to participate in the exhibition must present requests for admission to the Chilean legations in London, Paris, Berlin, Washington, Lima, Rio de Janeiro,

Buenos Ayres, and La Paz, together with the plans and details of the objects to be exhibited, stating also the number of workmen they propose to send for installing and directing the working of the engines and apparatus to be exhibited.

(3) Chileans and foreigners in Chile who wish to participate in the exhibition shall present, direct to the board of directors of the National Mining Society, or through the respective intendente or governor, a petition of admission in the same form as the foregoing (article 2), describing the peculiarities of the objects to be exhibited.

(4) The objects sent to the exhibition must be in Valparaiso or Santiago by the 11th of March, 1894, at the latest.

(5) The directive committee of the exhibition will defray the cost of the freight by sea and land both for the arrival and return of the objects exhibited, as well as the passages of the workmen and laborers that are sent to the country for installing and working the machinery and apparatus to be exhibited.

(6) Exhibitors will be expected to furnish foundations and all necessary work required to place exhibits in such positions as may enable them, if required, to receive the motive power. But all glass cases, tables, and forms required to preserve displays of minerals, plans, and valuable collections will be furnished by the directing committee of the exhibition. The same committee will furnish the necessary motive power for the machines and apparatus to be exhibited during the days and hours which will be duly fixed and the ores required to exhibit the capabilities of the respective apparatus.

(7) No compensation will be made for any losses that may occur on account of fire or other class of unforeseen accidents, although all possible care will be taken for protecting the locality of the exhibition. The committee will not respond for the loss or deterioration of the objects which are not removed within a month's time from the date of the closure of the exhibition.

(8) The classification of the objects exhibited and the awarding of the prizes will be done by juries named by the directing committee of the exhibition. Each jury will consist of five members, three Chileans and two foreigners, presided over by one of them named by absolute majority of votes. No jury can meet without the presence of at least three of its members, and when only this number is present its resolutions will have no force unless there exists perfect unanimity of opinions. In case only three members of a jury meet and they can not agree upon any point of their resolution, the presence of one or two of the other members will be required to arrive at a decision. In case of absence or impossibility to attend to his duty of a member or members of a jury, the directing committee will name a substitute for said member or members. The exhibitors may interpose objection against the decisions of the juries, which will be resolved by the directing committee of the exhibition, together with the presidents of the respective jury.

Let it be noted, communicated, and published.

MONTT,
President of the Republic.

V. DÁVILA LARRAIN,
Minister of Public Works.

FURTHER MEASURES.

Applications for admission must be returned with the signature of the would-be exhibitor, according to articles No. 384 and 4 of the regulations of the exhibition.

Only one type of each machine or exhibit will be admitted from each exhibitor.

Locality for exhibits will be allotted in priority of application.

The committee of the board of directors may limit the space applied for if they should think the space larger than necessary, and may even refuse to allot any room at all should they consider the object not fit to be exhibited.

Every box or package must be labeled "Esposicion de Minería i Metalurjia, Chile, Santiago."

Boxes containing different objects must be screwed, not nailed.

* * * * * * *

STEAMSHIP LINES IN CONNECTION WITH CHILEAN PORTS.

Pacific Steam Navigation Company.
Compañia Sud-Americana de Vapores.
English Steamship Line "Lamport & Holt."
German Steamship Line "Kosmos."
German Steamship Line "Hamburg Pacific."
Compagnie Maritime du Pacifique.

A special steamer will be chartered in due time for the exhibitors in the United States of America.

The principal European and North American insurance companies are represented in Chile.

THE RUSSIAN MINISTRY OF AGRICULTURE.

The Ministry of Agriculture, following the example of western Europe and the United States, is organizing special bureaus, to be attached to the scientific committee of the ministry, in the interest of rural economy in Russia. There will be in all nine bureaus, as follows: Agronomy, botany, zoölogy and zoötechnics, bacteriology, entomology, meteorology, farming, mechanics, forestry, and a bureau for the study of the soil. The scientific committee of the ministry will be divided into two sections, namely, rural economy and forestry.

The work of the first section will consist in the organizing and controlling of such establishments of the Ministry of Agriculture and crown domains as make scientific investigations and experiments for deciding different questions concerning the farming industry; in organizing laboratories for special analyses; in enacting measures against the adulteration of food stuffs, of seed, and of manure; in elaborating statutes, regulations, plans, and programmes for agricultural schools and for temporary courses of the different branches of farming and agriculture; in controlling the activity of farming schools, of experimental and meteorological stations, and other kindred establishments; in examining works written on agriculture and farming and in disseminating the valuable information found therein.

To the domain of the second section belong the following: Measures concerning the organization, valuation, and leasing of Crown forests, projects for exchanging such forests for others, of buying new forests, and the expropriation of forest domains; projects for the organization of forestry societies and assemblies and the examination of scientific works on forestry. But questions concerning the organization of forestry investigations, projects of statutes and regulations for forestry schools and their programmes, general measures for the planting of forests, for avoiding and exterminating forest fires and destructive insects, and for organizing protective forests will be examined in the joint assembly of both the sections of the scientific committee.

A specialist will be placed at the head of each bureau.

In the assemblies of the committee, besides its members, the directors of the Forest Institution, of the Farming Museum, of the Botanical Garden, inspectors of the agricultural and forest departments, and specialists of the different branches of agriculture will participate. Representatives of the Imperial Institution of Experimental Medicine will be invited to examine measures for combating harmful insects and vegetable parasites. In the assemblies of the committee, furthermore, will take part the directors of the departments of agriculture and forestry, and of the sections of rural economy, rural statistics, and agricultural improvements.

It will be seen from the foregoing, and especially from a glance at the work "Agriculture and Forestry in Russia," recently published in the English language by the Imperial Ministry of Agriculture, that great efforts are being put forth by the Government to improve in every way practicable the conditions of farming and rural economy in Russia. Thus is the hard lesson of the famine bringing forth good results.

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *November 29, 1893.*

AMERICAN PRODUCTS IN SINGAPORE.

Appreciating the importance of more specific information regarding American products brought to this market, I have asked the leading importers here for particulars on that subject, and have the honor to submit copies of the only two communications I have, as yet, received in answer to my inquiries.

Katz Bros. write:

> We have pleasure in stating the value of American goods imported by us during 1892: Rifles, $8,819; clocks, $3,000; smoking tobacco, $1,518; canned fruits, $1,165; copper paint, $1,100; chewing tobacco, $540; beer (quarts and pints), $495; Hitchcock lamps, $313; ice-cream freezers, $110.
>
> In 1891 we imported American axes and handles to the value of $8,684 (Mexican). Owing to the depression in the tobacco trade, consequent upon the McKinley tariff, most of the Sumatra and Borneo plantations were closed, and their implements bought at a ruinous price by the surviving companies, with the effect that we could not import any more such supplies.

Boustead & Co. write:

> The American produce we ourselves import are tinned fruits and salmon from San Francisco, and we are not, therefore, in a position to report upon exports generally from your country.
>
> The packing and get up of the fruits, in wooden boxes of two dozen tins each, are now so well known and approved in this market that we can suggest no change in either. The cases, as a general rule, arrive in very good condition, and are quite strong enough to withstand the usual handling to which they are subjected. The fruits are transshipped in

small quantities to various neighboring outports; but Bangkok is practically the only market with which a regular business is carried on, and, as the tariff rates there are covered by an imposition of 5 per cent on the value of all goods, no object can be gained by any alteration in the present method of packing.

In the case of salmon, however, the loss by breakage and spoilt tins is sometimes serious, and we think this might be lessened by a change in packing. Each case, as at present shipped from the United States, contains four dozen tins, and frequently the wood is too weak to sustain the weight of such a quantity. If a change were made to three dozen tins per case, we think in this way considerable saving in breakage might be effected. So far as we can learn, these goods are either sold for local consumption or for export to the native states, where no duty is imposed.

In American flour there is a small but regular trade here. Kerosene is imported from New York in considerable quantities, packed in cases containing two tins, which is found to be very suitable for the requirements of buyers. The trade has, however, been injuriously affected by the importations of Russian oil in bulk from Batoum, the packing being done here, mostly in tins, and also by supplies from Lang-Kat, Sumatra, the great bulk of which arrives and is sold in tins only, although a portion is imported in tins and in cases in the same way as the American oil.

Other communications will be forwarded as received.

E. SPENCER PRATT,
Consul-General.

SINGAPORE, *November 13, 1893.*

FALMOUTH OYSTER FISHERY.

For many years previous to 1859 the oyster fishery at Falmouth was not of much importance, it being always overdredged. In that year, however, there was a great fall of spat, much in excess of any that had taken place for years. In the years 1860 and 1861 there was an enormous quantity of oysters, and two men with a medium-sized boat and two dredges could catch from 20,000 to 25,000 in eight or nine hours. This fishing being free and open to all, quite a large fleet of large and small boats came from Faversham and Colchester, and upwards of 500 men and boys were engaged for three or four years. From that time the fishery began to decline, so much so that in 1872 onwards only about 100 men and boys were engaged in dredging, and even these could not get a living out of it; at last only a very few boats went out and scarcely caught a fish.

In 1877 the corporation took the matter in hand, obtained a provisional order, and closed some of the grounds, with the best results. The fishing has since then improved so much that this year we have quite an abundance of small fish, and nearly half a million of very young oysters have been dredged up by the men. These were bought by the town council at 2*s.* 6*d.* per thousand and laid down on the Velt bank, this part of the harbor being closed by the council for two years. Many thousands more could have been obtained had there been funds to purchase them. At this moment there are over 300 men and boys engaged in the fishery. They are just making a livelihood, for the fish are selling at a low price—large ones at 2*s.* 6*d.* per hundred and small ones at 8*d.*

It is much to be regretted that by an oversight dredging was allowed to commence in October instead of November. Many thousands of small oysters have been, it is thought, destroyed in consequence.

HOWARD FOX,
Consul.

FALMOUTH, *December 7, 1893.*

MEXICAN EXPORTS.

The total exports of Mexico for the fiscal years ending June 30, 1892 and 1893, were as follows: *

Description.	1892.	1893.
Precious metals	$49,137,304	$56,504,305
Coffee, fibers, skins, tobacco, woods, etc	26,330,411	31,004,916
Total	75,467,715	87,509,221

This shows a total increase in 1893 of $12,041,506.

The following statement gives the exports in detail:

Articles.	Fiscal year—	
	1891–'92.	1892–'93.
Precious metals:		
Argentiferous lead	$1,457,879	$7,402,641
Coined Mexican silver	26,478,376	27,170,865
Coined Mexican gold	175,524	113,964
Gold bullion	751,408	357,887
Silver bullion	6,559,670	5,148,599
Gold mixed with silver	....	404,563
Silver mixed with gold	1,294,087	2,977,994
Silver sulphides	1,458,095	1,584,202
Gold ore	31,289	145,785
Silver ore	10,478,264	10,940,750
Other metals	452,712	257,055
Total	49,137,304	56,504,305
Products other than precious metals:		
Coffee	5,514,355	8,727,119
Hennequen	6,358,220	8,893,071
Woods	1,676,351	1,673,738
Hides and skins	1,931,791	2,067,156
Broom corn	898,631	890,560
Tobacco	1,746,928	1,459,690
Other articles not specified	8,204,135	7,293,582
Total	26,330,411	31,004,916

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* The values in this report are given in Mexican money. The Mexican dollar on July 1, 1893, was valued by the Treasury Department of the United States at 65.6 cents.

The articles which were exported in decreased quantities were as follows:

Articles.	Decrease.	Articles.	Decrease.
Coined Mexican gold	$61,560	Broom corn	$8,071
Gold bullion	393,521	Tobacco	287,238
Silver bullion	1,411,071	Other articles not specified	910,553
Metals not specified	195,657	Total	3,270,284
Woods	2,613		

The articles which were exported in increased quantities were as follows:

Articles.	Increase.	Articles.	Increase.
Gold ore	$114,496	Argentiferous lead	$5,944,762
Silver ore	462,486	Coffee	3,212,764
Gold mixed with silver	404,563	Hennequen	2,534,851
Coined Mexican silver	692,489	Hides and skins	135,365
Silver sulphides	126,107	Total	15,311,790
Silver mixed with gold	1,683,907		

JOSEPH G. DONNELLY,
Consul-General.

NUEVO LAREDO, *December 12, 1893.*

SINGAPORE AS A TRADE MART.

Singapore, the seat of government of the Straits Settlements, is a well-built city of nearly 200,000 inhabitants, occupying the southern point of the island of the same name that lies just off the southern extremity of the Malay Peninsula, from which it is separated by a narrow strait some three-fourths of a mile in width. Situated within 80 miles of the equator (in latitude 1° 16′ N. and longitude 103° 53′ E.), and visited by almost daily rains, its climate is hot and moist and its vegetation tropical and luxuriant.

The advantages it possesses as a port are exceptional, the anchorage being safe, and the harbor, which is of immense capacity, is almost completely landlocked. As a great entrepôt of commerce the importance of Singapore can scarcely be overestimated.

Standing at the southernmost extremity of Asia, it commands the Malacca Straits, and thus virtually controls the trade of the East Indian archipelago and that between Europe and the far East. To this and to its being a free port are due its rapid growth and steady increase in wealth and population. The number of inhabitants of Singapore alone has increased from 97,131 in 1871 to 184,554 in 1891, the last year of the census, and is now estimated to have attained 200,000.

The business portion of Singapore faces the water front and stands in part upon land reclaimed from the sea. Its buildings are large and substantially constructed and its streets macadamized and well cared for. Upon the numerous hills in the rear are the residences, surrounded by gardens resplendent with the rich growth of the tropics, and so situated as to overlook the blue water of the bay and the still bluer water of the ocean beyond.

The commerce of Singapore (independent of the Straits Settlements as a whole) represented—

Year.	Imports.	Exports.
1872	$43,415,383	$39,020,121
1892	106,970,062	97,850,449

This shows an increase of $122,385,007 in a period of twenty years.

Last year the value of exports from Singapore to the United States alone was $10,201,849, which may be divided thus:

Articles.	Amount.	Articles.	Amount.
Tin	$4,640,056	Tapioca	$295,248
Rattans	1,224,013	Nutmegs	244,125
Black pepper	791,702	Coffee	217,693
Copal	373,685	Sago	115,439

There were also less extensive lots of rubber, dammar, gutta-percha, hides, cubebs, mace, white pepper, etc.

The returns of the Singapore registrar's office for 1892 place the total import here from the United States at $405,021, which I believe to be a decided undervaluation, only explicable on the ground that all goods arriving at Singapore are classed as of English origin when transshipped at a British port, as is the case with the bulk of American products destined for this market, with the exception of petroleum, which comes direct and of which the importations for the said year amounted to $345,500 at this port and $286,119 at that of Penang.

Exclusive of petroleum, the imports here from the United States consist almost wholly of small consignments of hardware, machinery, firearms, clocks, and canned goods.

E. SPENCER PRATT,
Consul-General.

SINGAPORE, *November 10, 1893.*

AMERICAN-SIAMESE TRADE.

If the trade between the United States and Siam has not reached its proper proportions, the fault lies principally with American merchants, who have made no effort to introduce their goods into this market. As the total imports of Siam, as declared by the customs, amount to about $10,000,000 annually, it is a market well worth the consideration of the American merchant.

The shipping and, consequently, the trade of this port is almost entirely in the hands of the British; indeed, something like 85 per cent of the carrying trade is in their hands, Germany following with about 8 per cent, the other 7 per cent scattering. But three American vessels have been in these waters for over a year, two of these being men-of-war and the third a small sailing ship from the coast of China.

The only goods imported from the United States are flour, kerosene, and some fine canned goods.

FLOUR.

The customs return for 1892 shows that 36,514 bags of flour, valued at $36,782.20, were imported from Hongkong, which practically means the United States, for all flour coming from Hongkong is American. Of Australian and Indian flour 6,544 bags, valued at $6,852.95, came via Singapore. It will thus be seen that our flour takes the lead.

The Siamese, of course, use very little flour, as they live almost entirely upon rice and fish; hence such importations as flour are mostly consumed by foreigners.

KEROSENE.

The only kerosene that finds a market in Bangkok, and consequently in Siam, is the American "Devoe's" and "Stella" brands and Russian, or "Anchor," brand. Up to the time of the introduction of oil in bulk in tank steamers from Russia, about a year ago, the sales as between the above oils were pretty equally divided. The average sales per month ranged from 6,000 to 8,000 cans of "Devoe's," 1,000 to 3,000 of "Stella," and from 8,000 to 12,000 of "Anchor" brand, or Russian. The sales of American oil have been materially lessened of late by reason of the introduction of this cheaper oil from Russia in bulk.

There has been considerable trouble, however, in introducing it to the natives, as they have been used to buying it in cans of 5 gallons each; and they are not, as a rule, given to experiment, going on the old theory of letting well enough alone. A can of this bulk oil, large enough to hold 10 gallons, was offered them at 50 cents, the oil being the same in quality as the "Anchor" brand, which has heretofore been imported in cans at about 7½ cents per gallon. The old prices of the same oil imported in 5-gallon cans was about 19 cents and the American about 25 cents per gallon, yet they are slow to accept the new and cheaper oil. To meet their objection one firm has established a canning factory, with the intention of putting up the bulk oil in the regular 5-gallon cans. It is believed that even then the Siamese will be doubtful, as the new cans will not have the old brands to which they have become used, and thus further difficulty is anticipated.

The great difference in cost will, however, in time gain the day for the bulk oil, for all other oils will be practically shut out of these markets, as no one but the foreigner, who naturally prefers the American refined oil, will buy them.

Something should be done to place our oils more on an equality in price with the Russian product if our companies desire their oils to remain in these markets. Certainly a step looking to the reorganization of their trade with the Orient can not be taken too soon. To regain the ground lost, or even maintain what they have will require considerable work, time, and energy.

CANNED GOODS.

Not over $200 worth of canned goods are imported yearly from the United States. The Siamese do not consume such articles, hence this trade must depend upon the foreign element, and, as the foreign population is composed principally of English, Germans, and Danes, who naturally prefer goods of this character put up in their own countries, the demand for our goods is necessarily small.

COTTON GOODS, ETC.

A large trade could, I believe, be opened up with Siam in cotton goods, agricultural implements, hardware, liquors, and many other articles if our merchants would make the necessary efforts to place their goods on this market.

ROBERT M. BOYD,
Vice-Consul-General.

BANGKOK, *November 2, 1893.*

IRON ORE AND MANGANESE IN CUBA.

IRON ORE.

The principal iron mines of Cuba are between Santiago and Guantanamo, along the southeastern coast of the island, within a radius of 50 miles. Three American companies—the Juragua, the Sigua, and the Spanish American—have, in the aggregate, invested about $12,000,000 in plants to develop these mines. Several additional millions of American capital are invested in ships which transport the ore from Cuba to Baltimore, Philadelphia, Perth Amboy, and New York.

During the year 1892 the amount of ore shipped from this consular district was 341,050 tons, and for the first six months of the present year the amount was 273,000 tons. Two of the three companies—the Sigua and the Spanish American—have shipped thus far very little ore, having not much more than established their plants when the late financial depression in the United States caused the mines to shut down.

The ore from the Cuban mines yields from 60 to 67 per cent of pig iron. But the value of iron ore does not depend alone upon the percentage of iron that it will yield, but also upon the nature of the foreign substances which must be eliminated. These foreign substances are usually sulphur, silica, phosphorus, manganese, alumina, lime, magnesia, together with organic and volatile matter. The Cuban ore is peculiarly free from all foreign substances except organic and volatile matter, which are easily and cheaply eliminated.

MANGANESE.

Manganese, which is used in the manufacture of steel, is also found in an unlimited supply in the same mountain range of Cuba in which the iron ore is found, but between Santiago and Manzanillo, within a distance of 75 miles. American enterprise has also asserted itself here by capturing the richest and most available mines. These mines are now being connected with the seaboard by short-line railroads.

During 1892 there were shipped to the United States from this consular district 18,851 tons of manganese, and during the first six months of the present year the amount transported was 11,640 tons.

I am reliably informed that immense quantities of manganese have been discovered in the Caucasus Mountains, between the Black and Caspian seas, and that European capitalists claim that they will be able to deliver manganese in Baltimore at $9 per ton. Cuban manganese has been delivered there the past year at an average cost of about $15 per ton. With the rich deposits of the Ponupo and other mines recently discovered here, the completion of railroad connections with the coast, and the addition of improved machinery now being put up, those interested in the Cuban mines confidently assert their ability to undersell the Europeans in the American markets. The decreased price of manganese will make available many Pennsylvania iron mines which it does not pay to work at present.

PULASKI F. HYATT,
Consul.

SANTIAGO DE CUBA, *December 11, 1893.*

GERMAN BEET-SUGAR RETURNS.

[August 1, 1892, to July 31, 1893.]

From the official statistics, just published, I beg leave to submit the following data.

This year has been of special importance to the sugar-growers, as the system of taxation was changed by law of May 31, 1891, to go into effect August 1, 1892. Under the old law, beets were taxed 80 pfennigs* per 100 kilograms,† and an additional tax of 12 marks‡ was levied on every 100 kilograms of sugar for domestic consumption. This tax of 80 pfennigs on the beets was refunded on exported sugars by means of a premium. The new law dropped the beet tax of 80 pfennigs entirely and substituted a tax of 18 marks per 100 kilograms on sugars for domestic consumption. The sugars which are exported are, as heretofore, exempted from this tax, but the export premium, which amounted under the old law to 8.50 marks per 100 kilograms, is reduced as follows:

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*80 pfennigs = about 19 cents. †1 kilogram = 2.2 pounds. ‡1 mark = 23.8 cents.

Description.	August 1, 1892, to July 31, 1895.	August 1, 1895, to July 31, 1897.
	Marks.	*Marks.*
On raw sugar of at least 90 per cent and refined sugar of from 90 to 98 per cent purity..	1.25	1.00
On candies and sugars in white, full, hard loaves, blocks, plates, sticks, and crystals, and other sugars of at least 99½ per cent purity	2.00	1.75
On all other hard sugars	1.65	1.40

After July 31, 1897, all bounties are to be discontinued. I notice, however, from the papers that the sugar growers and refiners are putting out feelers already to have this premium system continued after July 31, 1897, claiming that they would be at too great a disadvantage with other countries, principally France and Belgium, if the premium was dropped entirely.

By the same law the duty on imported sugars was raised from 30 marks to 36 marks, excepting on such imported sugars as enter again into the manufacture here. Such sugars are credited with the consumption tax of 18 marks, thus paying only a net duty of 18 marks per 100 kilograms.

The number of raw-sugar factories decreased from 403 to 401. As in former years, the factories have made great endeavors to obtain an even, small, and sweet beet, have themselves, in most cases, furnished the seed to the growers at cost price, and have closely watched the sowing and cultivating of the fields. As far as manuring is concerned, the growers are now permitted to use artificial fertilizer, especially Chile saltpeter in liberal quantities, adding in the fall fresh stable manure, which was formerly strictly prohibited. The weather was not very favorable to the beet crop during the year. A mild spring quickly developed the plants, but their growth was checked by an exceptionally dry and hot summer. The dry heat hastened their ripening, without allowing them to grow out to their full size. A wet and cool September again set the beets to growing, but at the expense of their sugar quality. Especially in my district, the most important for this industry, the crop was considerably below the average.

In purifying the raw juice of the beets new experiments have been made with electricity. The juice, by means of zinc electrodes, has been subjected to electrolysis in a vessel expressly constructed for that purpose. By this process a cloudy, slimy mass settles at the bottom of the vessel, and thus the juice is cleared of its principal impurities. After this treatment the juice is saturated as formerly. So far, however, these experiments have not been accompanied by a pronounced success, and the practicability of this process is doubted by many.

The refining of the sirups and residues in the sugar factories themselves has been abandoned to a great extent, and it is claimed that the time is not far off when sugar factories, instead of refining their own sirups and residues, will find it to their advantage to sell them to factories especially built for that purpose.

The chips of beets have always been a very nourishing fodder for the farmers' stock. To preserve the chips over winter they were generally stored in large pits dug in the ground. It was proved, however, that in this way the chips lost about 25 per cent of their nutritious qualities, and to overcome this loss a method of drying them has been adopted which has given satisfaction.

The following tables show the state of the industry during the year, compared with the previous year:

Description.	1892–'93.	1891–'92.
Number of factories	401	403
Steam engines in use	5,122	4,879
Horse power	81,596	73,211
Beets grown by factories...tons	1,511,835	4,639,633
Beets grown by stockholders under contract...do	3,302,740	
Beets grown by outsiders...do	4,997,365	4,848,369
Total beets grown...do	9,811,940	9,488,002
Area under cultivation...hectares	352,015	336,454
Average yield per hectare...tons	27.9	28.2
Average value of 100 kilograms of beets...marks	2.09	1.80
Raw sugar extracted...tons	1,175,137	1,144,368
Raw sugar yielded by 100 kilograms of beets...kilograms	11.98	12.06
Beets required to gain 100 kilograms of raw sugar...do	835	829
Raw sugar on hand July 31, 1893...tons	26,920	50,851

NOTE.—1 ton=2,200 pounds; 1 hectare=2.471 acres.

Comparative statement of the sugar campaign years from 1873–'74 to 1892–'93.

Year.	Number of factories.	Engines.	Horse power.	Methods in use to gain the juice.		
				Diffusion.	Pressing.	Others.
1873–'74	337	2,203	21,954	80	214	43
1874–'75	333	2,233	22,712	113	181	39
1875–'76	332	2,300	23,325	157	137	38
1876–'77	328	2,370	24,923	197	98	33
1877–'78	329	2,413	25,788	224	81	24
1878–'79	324	2,493	26,882	258	50	16
1879–'80	328	2,627	29,586	291	28	9
1880–'81	333	2,816	32,269	309	20	4
1881–'82	343	3,046	35,476	324	16	3
1882–'83	358	3,365	40,515	343	12	3
1883–'84	376	3,715	46,158	368	6	2
1884–'85	408	4,196	56,119	402	4	2
1885–'86	399	4,188	57,194	395	3	1
1886–'87	401	4,276	58,770	397	3	1
1887–'88	391	4,292	58,325	387	3	1
1888–'89	396	4,363	60,313	393	3	....
1889–'90	401	4,509	63,753	398	3	....
1890–'91	406	4,716	68,691	403	3	....
1891–'92	403	4,879	73,211	400	3	....
1892–'93	401	5,122	81,596	401	....	....

Comparative statement of the sugar campaign years from 1873–'74 to 1892–'93—Cont'd.

Year.	Beets grown.	Yield per hectare.	Raw sugar extracted.	Raw sugar yielded per 100 kilograms of beets.	Beets necessary to produce 100 kilograms of raw sugar.
	Tons.	*Tons.*	*Tons.*	*Kilograms.*	*Kilograms.*
1873–'74	3,528,764	27.2	291,041	8.25	1,212
1874–'75	2,756,745	20.6	256,412	9.3	1,075
1875–'76	4,161,284	29.3	358,048	8.6	1,162
1876–'77	3,550,037	25.2	289,423	8.15	1,227
1877–'78	4,090,968	27.4	378,009	9.24	1,082
1878–'79	4,628,748	28.9	426,155	9.21	1,086
1879–'80	4,805,261	25.2	409,415	8.52	1,174
1880–'81	6,322,203	32.7	555,915	8.79	1,137
1881–'82	6,271,948	28.3	599,722	9.56	1,046
1882–'83	8,747,154	34.4	831,995	9.51	1,051
1883–'84	8,918,130	29.9	940,109	10.54	949
1884–'85	10,402,688	32.9	1,123,030	10.79	926
1885–'86	7,070,317	30.2	808,105	11.43	875
1886–'87	8,306,671	30	985,628	11.87	843
1887–'88	6,963,961	26.4	910,698	13.08	765
1888–'89	7,896,183	28.2	944,505	11.96	836
1889–'90	9,822,635	32.9	1,213,689	12.36	809
1890–'91	10,623,319	32.2	1,284,485	12.09	827
1891–'92	9,488,002	28.2	1,144,368	12.06	829
1892–'93	9,811,940	27.9	1,175,137	11.98	835

Home consumption of sugar.

Year.	Total.	Per head.
	Tons.	*Kilograms.*
1873–'74	298,339	7.2
1874–'75	273,290	6.5
1875–'76	323,180	7.6
1876–'77	241,575	5.6
1877–'78	290,114	6.7
1878–'79	296,049	6.7
1879–'80	281,514	6.3
1880–'81	277,618	6.8
1881–'82	291,045	6.5
1882–'83	366,045	8.1
1883–'84	349,671	7.7
1884–'85	454,606	9.9
1885–'86	313,358	6.8
1886–'87	361,476	7.7
1887–'88	398,163	8.4
1888–'89	357,614	7.4
1889–'90	447,116	9.1
1890–'91	470,253	9.5
1891–'92	476,265	9.5
1892–'93	501,319	9.9

Sugar exported during the year.

	Tons.
Hamburg (bonded stores)	15,194.9
England	273,163.6
Holland	41,076
Sweden	12,666.8
United States	65,842.4
All other countries	16,801
Total in 1892–'93	424,744.7
Total in 1891–'92	436,671.7

Revenue to the Government.

Year.	Material and consumption tax.	Duty on imports.	Total.	Premiums and drawbacks.	Net revenue to Government.	Per head of population.
	Marks.	*Marks.*	*Marks.*	*Marks.*	*Marks.*	*Marks.*
1873–'74	56,460,000	7,779,000	64,239,000	3,593,000	60,646,000	1.46
1874–'75	44,108,000	7,218,000	51,326,000	1,651,000	49,675,000	1.18
1875–'76	66,581,000	5,672,000	72,253,000	9,004,000	63,249,000	1.49
1876–'77	56,800,000	3,354,000	60,154,000	11,618,000	48,536,000	1.13
1877–'78	65,456,000	2,369,000	67,825,000	18,009,000	49,816,000	1.15
1878–'79	74,060,000	2,112,000	76,172,000	25,627,000	50,545,000	1.15
1879–'80	76,875,000	1,730,000	78,605,000	24,399,000	54,206,000	1.22
1880–'81	101,164,000	1,481,000	102,645,000	56,496,000	46,149,000	1.12
1881–'82	100,351,000	1,518,000	101,869,000	44,992,000	56,877,000	1.25
1882–'83	139,955,000	1,730,000	141,685,000	74,398,000	67,287,000	1.47
1883–'84	142,690,000	1,401,000	144,091,000	96,302,000	47,789,000	1.04
1884–'85	166,443,000	1,379,000	167,822,000	128,453,000	39,369,000	0.86
1885–'86	113,125,000	1,435,000	114,560,000	90,068,000	24,492,000	0.53
1886–'87	141,213,000	1,232,000	142,445,000	108,821,000	33,624,000	0.72
1887–'88	118,387,000	1,858,000	120,245,000	105,568,000	14,677,000	0.31
1888–'89	108,694,000	1,477,000	110,171,000	80,076,000	30,095,000	0.62
1889–'90	140,965,000	1,510,000	142,475,000	61,916,000	80,559,000	1.64
1890–'91	151,859,000	2,257,000	154,116,000	78,356,000	75,760,000	1.52
1891–'92	143,515,000	3,138,000	146,653,000	74,611,000	72,042,000	1.43
1892–'93	85,971,000	695,000	86,666,000	34,451,000	52,215,000	1.03

JULIUS MUTH,
Consul.

MAGDEBURG, *December 21, 1893.*

TOBACCO CULTURE IN GERMANY.

The latest quarterly report of the imperial statistical office of Germany contains the statistics of the tobacco crops of the past three years and furnishes the data for making a comparison of results reached by German and American growers.

The number of tobacco-planters in Germany in 1891 was 162,739; in 1892 there were 145,139; and in 1893 there were 141,775. The number in 1880 was 246,639, or more than 100,000 above the present number.

An examination of the figures showing the amount of land cultivated by each grower indicates that tobacco farming is carried on upon a very large scale:

Amount of land cultivated.	Number of growers.	
	1892.	1891.
1 are or less	77,933	78,496
Between 1 and 5 ares	8,502	10,314
Between 5 and 10 ares	16,302	19,799
Between 10 and 25 ares	27,129	33,970
Between 25 ares and 1 hectare	13,901	18,503
More than 1 hectare	1,372	1,657

NOTE.—1 are=120 square yards; 1 hectare=2 47 acres.

From these figures it appears that the number of larger growers fell off considerably more than that of the smaller ones, the decline in the first three classes being 10, 17, and 12 per cent, respectively, while in the latter three classes the like figures are 20, 24, and 17 per cent.

The number of tobacco patches in 1891 was 229,784; in 1892 there were 196,476, and in 1893 there were 195,698. The total area planted in 1891 was reckoned at 45,874 acres; in 1892 at 36,956 acres, and in 1893 at 37,644 acres. From these figures it appears that the average acreage for each grower is somewhat less than one-fifth of an acre—the exact figures being 0.199 acre in 1891; in 1892, 0.188 acre; and in 1893, 0.192 acre.

The figures for yield and value of crop for 1893 have not yet been published, but the figures for 1891 and 1892 are as follows:

Year.	Yield of cured.		Value.		
	Total.	Per acre.	Total.	Per acre.	Per pound.
	Pounds.	*Pounds.*			*Cents.*
1891	76,503,614	1,667	$6,166,110	$134	8
1892	66,766,854	1,806	5,781,790	156	8.6

Tobacco-growing is confined to the southern states and provinces of the Empire. The 1892 crop will give a fair idea of the relative importance and productivity of each state:

State.	Area planted.	Product.	Product per acre.	
			Quantity.	Value.
	Acres.	*Pounds.*	*Pounds.*	
Baden	14,878	27,646,740	1,858	$169
Prussia	11,644	20,006,800	1,718	146
Bavaria	5,389	8,574,060	1,591	120
Alsace-Lorraine	2,758	6,243,160	2,227	181

A comparison of these results with those reached by our own growers is very much to the disadvantage of the latter. Against the average of 1,806 pounds per acre, worth $156, as shown in the above figures, the American crop for the eight years 1881-'88, as estimated by the Department of Agriculture, averaged only 723 pounds per acre, worth only $61. These figures suggest a very wide margin for improvement on the part of our growers. Differences of climate and soil can hardly explain the wide difference in results. Would not an exhaustive investigation of German methods of planting and cultivating be worth undertaking by our agricultural authorities?

WM. C. DREHER,
Consular Agent.

GUBEN, *December 15, 1893.*

GERMAN INDUSTRIAL AND COMMERCIAL SITUATION.

The manufacturing and commercial interests of Germany have reached a stage during the closing months of 1893 which is in some respects unprecedented and offers material for an interesting study. There is, on the one hand, general and vigorous complaint on the part of every class which is likely to be affected by the new forms of taxation that are now under discussion in the Reichstag that business throughout the Empire is at a low ebb, profits steadily decreasing, and the cost of living greater than ever before. On the other hand, wherever precise statistics are accessible there seems to be evidence of normal activity, and in many cases of increased product and liberal profits.

ANILINE DYES.

The Farbwerke, a large manufactory of aniline colors and chemical products at Hoechst, near Frankfort, will declare at the close of this year a dividend of 26 per cent on its capital of 15,000,000 marks; the aniline and chemical works of Heinrich Baeyer, at Elberfeld, will repeat its last year's dividend of 18 per cent; and the Badische Aniline and Soda Fabrik, at Ludwigshaven, near Mannheim, is equally prosperous. And yet all of these companies suffered more or less from the serious prostration of their American export trade during the third quarter of the present year, but from which it is now rapidly recovering. It is well understood that in all the standard aniline dyes, the manufacture of which is open to general competition, prices have been reduced to very close margins during recent years; but the prosperity of that branch of business is well maintained by the large profits derived from special patented colors and medicinal preparations, of which each of the large German chemical firms owns a number that are patented in its own name in the United States, thus securing to the patentee a monopoly of its production and sale.

ANTIPYRINE.

A notable example of this is antipyrine, which is manufactured exclusively under the Knorr patents by the Farbwerke at Hoechst. It is estimated that not less than 75 tons of this preparation are manufactured and sold annually, representing, according to one authority, a value of $1,452,000, the greater part of which is clear profit.

PAPER INDUSTRY.

The paper manufacture is likewise, to all appearances, prosperous and profitable, although complaint is heard of low prices and the serious competition of Norway and Sweden in the manufacture of wood pulp. At Aschaffenburg, an important center of the pulp and paper industries on the River Main, some miles above Frankfort, a number of the mills are working night and day, and one company is making important additions to its already extensive plant. It is noteworthy, in connection with this subject, that a large portion of the American supply of photographic paper is made at Malmedy, a town in northwestern Germany near the Belgian frontier, whence it is brought to Aschaffenburg and there coated with baryta, then exported to the United States and sensitized at factories in western New York and elsewhere, and finally sold to consumers throughout our country and exported to Mexico, South America, and even to England.

FREIGHTS.

Another significant fact in the general situation is that, notwithstanding the severe drought and consequent low water which for a time during the past summer nearly suspended navigation on the Rhine, the aggregate of freights carried on that important channel of commerce during the first seven months of the present year was greater than ever before in the same period of time. The total amount was 58,200,000 centners (2,910,000 tons), of which about five-eights consisted of coal, the remainder being principally grain, timber, metals, etc., the higher classes of freights being carried, as usual, largely by the two competing railways which follow either shore of the river from Mayence to Cologne. The quantity above stated is an increase of 20 per cent over the traffic of the same period in 1892, and more than the totals for the entire years in 1866 and 1887. Business on the Rhine is still strong and active, but the exact statistics will not be available until the close of the year.

SUGAR MANUFACTURE.

The sugar manufacture has been so prosperous that there is now a general movement toward the enlargement of existing factories and the erection of new ones. This is especially the case in Mecklenburg, where the Tagblatt has been recently moved to utter a note of warning against this dangerous expansion of producing capacity, in which it points out that the world's sugar product is already 6,700 tons, or 10 per cent, in excess of normal consumption and predicts that any further increase in the product will bring on a disastrous collapse in prices which will jeopardize the entire industry. However well or ill founded this warning may be, the present situation of the German sugar-makers is generally satisfactory. Stocks of old sugar in the hands of dealers are said to be unusually small, and the profits of the principal manufacturers during the past season, as shown by their published reports, have been princely. From a long official list of declared dividends, it appears that they range from 7 to 30 per cent of the invested capital, and in some cases even the latter figure is surpassed. Thus it is stated by Kuhlow's German Trade Review that the sugar factory at Nordstemmen, with a capital of 525,000 marks, shows a net profit of 211,151 marks; the one at Northeim, with 1,050,000 marks capital, earns 403,588 marks; Guhrau, with 600,000 marks, earns 181,588 marks; Rostock, with 800,000 marks, earns 294,144 marks, and so on through a long list. The factory at Gross-Ammersleben, which lost last year 2,131 marks, earns this year a net profit of 16,703 marks, which fairly illustrates the comparative prosperity of sugar-making in Germany during the two years. The reasons for this highly favorable situation are various, but the principal one is probably the fact that the long, hot drought of the spring and summer rendered the beets smaller in bulk than usual, but intensely sweet, so that the juice was ripe in quality, rich in sugar, and easily evaporated and refined. It is not strange that profits of 25 and 30 per cent should be tempting to investors; and, notwithstanding all warnings, an important increase in the sugar-producing capacity of Germany may probably be made during the coming year.

MINING AND METALS.

In the field of mining and metal manufacture the results of the year's business vary from full prosperity to extreme depression, in which many companies and firms have worked against the steadily declining iron and steel market with great difficulty and diminished profits. The very large concerns, like Krupp & Co., and others who have the advantage of ample capital and the most improved machinery, have generally done fairly well. The Dusseldorf Railway Material Supply Company declares a dividend for the fiscal year 1892–'93 of only $51,968, against $80,977 for the preceding year. On the other hand, the General Electrical Company, of Berlin, with a capital of $4,860,000, shows net earnings for the fiscal year 1892–'93 of $389,779, against $364,689 for the same period of 1891–'92.

Coal.—By reason of the miners' strikes in France, Belgium, and Great Britain, coal has been firm and steady, with a generally increased production in this country. In the three principal coal districts of Germany—the Ruhr basin, the Saar district, and Silesia—the aggregate output for the seven months to August 31 was 31,550,960 tons, against 29,682,760 tons mined during the same period in 1892, an increase of 6.3 per cent. At the same time the imports of foreign fuel decreased proportionately, so that in October the receipts of British coal and coke declined to 297,567 tons, as compared with 405,857 tons imported during October, 1892. Prices at the German mines have fluctuated somewhat, but a fair average would be about $2.64 per metric ton for coke, $1.92 to $2.04 for gas coal, and from $1.35 to $1.48 for coking coal. The Dortmund Coal Syndicate sold during the fiscal year ended on the 30th of June last 2,199,448 tons of coal at an average price of $1.80 per metric ton. Exports of German coal to Italy over the St. Gothard route have declined somewhat, owing to the financial depression which prevails in that country, but this loss has been more than balanced by an immense contract that has been placed in Westphalia for coke to be exported to the iron district of Bilbao, in Spain.

Iron and steel.—In general, it must be admitted that the market values of iron and steel in Germany, as elsewhere, are dangerously low, and that, while some of the great firms with Government or foreign contracts and the best facilities of all kinds have prospered, the new and smaller ironmasters have been obliged to reduce wages and sail very close to the wind. It is remarked with anxiety in England that iron and steel prices are lower in Germany than in Great Britain; and, what is still more ominous, such values even in the United States are rapidly approaching the lowest point of profitable production in England and Wales. "If," say in effect the British journals, "iron and steel can be made in the United States for the prices which now prevail there, the day is not far distant when the American metal manufacturers will be able to dispute with us the control of our own and the colonial markets, as Germany has already commenced to do." The cheapness of production in the United States resulting from the combination of Bessemer ores from Lake Superior and foundry ores from the Southern States, backed with an unlimited supply of every kind of coal, is becoming recognized as a fact of serious import to British ironmasters, who are forced to rely more and more every year upon imported ores. An English expert, who has spent the summer in studying the department of mines and mining at Chicago, has recently declared that when the Americans add to their cleverness in the economy of their one costly element—labor—the scientific mastery of the Germans in saving fuel and subsidiary products in coking, roasting, and smelting operations, they will control the market price of iron and steel throughout the world. At present, he says that the Americans secure high average production in many of their best establishments, but this is done at the cost of what Europeans consider an undue consumption of fuel.

AGGREGATE EXPORTS AND IMPORTS.

Continuing this examination into the general foreign trade of Germany, for which only the returns of the first three quarters of the current calendar year are at present accessible, the situation appears to be, on the whole, more favorable than would be expected from the generally despairing tone of the commercial press. The total imports of Germany during the first nine months of this year amounted in weight to 21,938,923 tons, an increase of 1.06 per cent over those of the same months in the preceding year.

Exports during the same period reached 15,264,793 tons, an increase of 6.16 per cent over those of 1892. Putting together imports and exports, the aggregate shows an increase in weight of 3.09 per cent and in value of one per cent over the totals for the same nine months in 1892. This is certainly not a discouraging exhibit for a year of such general depression as the present.

A complete analysis of this increased foreign trade would show that, in respect to imports, a larger proportion has been in the nature of coarse goods and raw materials, since the increased bulk of imports has been accompanied by a notable decline in their net values. Imported cotton goods show an increase of 6.74 per cent; flax and other fibers, 6.6 per cent; linen yarns and fabrics, 23.91 per cent; silk and silk goods, 4.87 per cent; and wool and woolen goods, 7.64 per cent.

In exports of textile goods, cotton manufactures show an increase of 1.83 per cent; silk and silk goods, 12.24 per cent; and woolen goods, 6.61 per cent. All the export schedule of metals exhibits a substantial growth, the most notable items being iron and steel, with a net value increase of 11.55 per cent; copper and copper manufactures, 19.11 per cent; zinc and zinc manufactures, 40.91 per cent; and tin, 8.78 per cent.

To sum up: The exports of the first nine months of 1893, even at the low prices which have prevailed during the entire year, exhibit an increase of $39,632,143, and the imports a falling off in value of $26,455,232, which is equivalent to a net gain in the balance of trade of $66,087,375 in favor of Germany.

The salient features of the present situation are therefore sufficiently obvious. While nearly all values are extremely low and profits in many cases meager, this depression in value of product has been met in many instances to a great degree by corresponding reductions in wages, which—particularly in Berlin and throughout Saxony—are steadily declining. So that, on the whole, the volume of foreign trade has been more than maintained, and the Germans are in good working condition and ready to take prompt advantage of any improvement that may occur in the American or other foreign demand. Probably no nation in the world is at present more actively or systematically engaged in efforts to extend its foreign export trade than Germany. Profiting not only by the acknowledged success of their own exhibits at the Columbian Exposition, but by all the hints and suggestions that the German manufacturers obtained there from a careful study of the products of other nations, they are now organizing syndicates and associations, each representing a separate industry, the members of which contribute to a fund to be expended in sending expert salesmen into foreign markets, studying the wants of each country, and by personal application pushing the sale of German manufactures. In all this they are setting an example that American exporters might profitably imitate.

As manufacturers the Germans may lack somewhat in originality, but they make up for this by their cleverness in copying and adopting promptly the best improvements originated by their rivals in other countries. There are few really valuable American machines or implements which are not more or less closely imitated and abundantly produced in this country. These imitations have been thus far, with few exceptions, inferior in finish and perfection of workmanship to the originals, but their quality is steadily improving; and the tactics of the German exporters will need to be met by equally vigorous and intelligent efforts on the part of our merchants if the latter expect to maintain and improve their standing in the markets of South America, Australia, and the East.

FRANK H. MASON,
Consul-General.

FRANKFORT, *December 22, 1893.*

TRANSACTIONS IN TIMBER LIMITS IN ONTARIO.

The following summary table shows the area of timber limits under license and the revenue derived therefrom by the province during the years 1888–'92, inclusive:

Year.	Area under license.	Interest and trespass dues.	Timber dues.	Ground rent.	Bonus.	Total.
	Square miles.					
1888	16,934	$35,356.14	$823,775.08	$58,893.83	$769,990.34	$1,688,015.39
1889	17,226	12,232.10	902,043.07	59,430.50	66,058.16	1,039,763.83
1890	13,555	7,320.53	677,875.97	58,096.00	135,479.53	878,772.03
1891	15,820	27,451.20	579,725.28	57,711.00	172,551.22	837,438.70
1892	12,887	19,942.71	767,982.80	58,606.25	1,309,260.91	2,155,792.67

A few words of explanation will be necessary to give a clear idea of the above figures. The title to the lands is in the province. The license is an annual one; it authorizes the licensee to cut wood on the land subject to law and regulations. The area under license in any one year shows the amount of Crown timber lands on which a license to cut timber has been issued for that year; it varies in sympathy with the lumber trade.

The licensee must pay an annual ground rent of $3 per square mile, and also pay certain timber dues on all marketable timber taken from the land. These timber dues are from $1 to $1.25 per 1,000 feet board measure and from $20 to $25 per 1,000 cubic feet of solid timber. The total amount received from timber dues depends upon the state of the lumber trade.

The bonus is received from newly licensed land only. It is a sum offered for the privilege of taking out a license on certain timber limits sold at public auction. It is made payable in part payments extending over several years. The amount received from bonuses sustains no relation whatever to the area under license.

The bonus received during the five years in question was the result of three sales of timber limits, as follows:

On December 15, 1887, there were sold 459 square miles situated in the Nipissing district at a total bonus of $1,312,312, or an average of $2,859 per square mile. The highest price per square mile was $6,300.

On October 1, 1890, there were sold 376 square miles situated in the Rainy River district, parts of which have been burnt over, at a total bonus of $346,256.25, or $916.06 per square mile. The highest price per square mile realized at this sale was $2,625.

On October 13, 1892, there were sold 633 square miles situated in the Parry Sound district at a total bonus of $2,315,000. The highest price realized per square mile was $17,500, and the average was $3,657.18 per square mile.

The amount of bonus realized at these sales affords but little basis for an estimate of the advance in value of the standing timber in Ontario, for the reason that the different sales were in sections of the country widely apart, and the timber lands themselves were not of the same value.

JOHN B. RILEY,
Consul-General.

OTTAWA, *January 12, 1894.*

THE JUTE TRADE OF DUNDEE—1893.

The year just closed has been one of the most unsatisfactory and unprofitable, so far as the jute trade of this district is concerned, that has been experienced in a long time. There has been an entire absence of the usual demand for manufactured goods, and in consequence prices have been low, sales in many cases having been made at less than cost. Several causes have combined to produce this unfavorable result:

First. The strikes in the cotton districts of Lancashire and in the coal-mining districts of both England and Scotland have tended to paralyze the home trade. The high price of coal resulting from the strike has in many cases enhanced the cost of manufacture.

Second. The financial troubles in the United States and the proposed reduction in the tariff on jute goods have greatly reduced the usual demand from there, and as the bulk of the total production ordinarily goes to that market, it will be seen what a serious loss this has been.

Third. There has been a steady and serious rise in the price of jute without a corresponding increase in the value of yarn and cloth. This apparent anomaly is explained by the fact that the raw material is largely controlled by speculators, who have this year been aided by a shortage in the crop, and, on the other hand, the keen competition for orders, owing to the dullness of the market, has kept the price of the manufactured article low. The consequence is that nearly every factory in Dundee is at present running on short time, as the owners are unwilling to go on manufacturing goods for stock under existing circumstances; and it is estimated that 25 per cent less yarn and 30 per cent less cloth is now being produced than was made a year ago.

Fourth. The increasing competition caused by the extension of the producing power of the jute mills in India.

While the first three reasons for this year's depression are exceptional and may never occur again, the last cause, to my mind, is a very serious matter to the trade of Dundee and one that will require all the proverbial shrewdness of the Scotch to overcome. That the manufacturers here are alive to the situation is evinced by the fact that representatives of a number of concerns have within the past two months gone out to India to investigate the workings of the mills there.

It is estimated that the labor cost in this district of manufacturing a ton of raw jute into ordinary burlap is £11 to £12, as against £7 to £8 in Calcutta; and this notwithstanding that it takes a greater number of hands to produce the same amount of material in India, the difference being explained by the exceedingly low wages paid in the Indian mills. Heretofore local manufacturers have been able to equalize this difference, owing to the superior skill of the workmen employed and more improved machinery, and they may be able to do so for many years to come in the better class of goods; but in cheap goods, where comparatively little skill on the part of the operative is essential, the competition every year is being more seriously felt.

The following tables show the imports and exports by countries and prices of jute and its manufactures during the past five years:

Jute imported into Dundee.

Whence imported.	1889.	1890.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*
From India direct	215,132	226,820	220,288	168,314	162,085
From London, Liverpool, etc.:					
Coastwise	7,682	12,064	8,440	6,605	12,419
By rail	71	550	2,080	1,655	102
Total	222,885	239,434	230,808	176,574	174,606

Jute exported from Dundee.

Year.	Quantity.	Year.	Quantity.
	Tons.		*Tons.*
1889	16,177	1892	10,639
1890	11,861	1893	14,500
1891	16,799		

Jute imported into United Kingdom.

Port of importation.	1889.	1890.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*
Dundee	222,885	239,434	230,808	176,574	174,606
London, Liverpool, and other ports	150,595	130,524	113,912	78,986	104,028
Total	373,480	369,958	344,720	255,560	278,634

Jute exported from United Kingdom.

Whither exported.	1889.	1890.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*
Russia	4,869	5,065	6,377	4,167	5,734
Norway and Sweden	1,443	1,536	2,007	2,494	3,198
Germany	36,267	29,447	22,230	22,998	26,163
Holland	14,581	14,111	12,200	10,985	15,207
Belgium	10,566	12,614	11,705	7,367	8,178
France	39,496	40,816	50,004	33,021	40,724
Spain	3,974	3,091	3,006	2,758	3,978
Total to Europe	111,196	106,690	107,529	83,790	103,182
United States	4,434	3,098	2,471	3,326	4,026
Grand total	115,630	109,778	110,000	87,116	107,208

Prices of jute (per ton).

Marks.	1889.	1890.	1891.	1892.	1893.
	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
On January 1:					
M in double triangle	13 10 0	15 5 0	11 10 0	17 10 0	12 10 0
RF-C or D-4	16 0 0	18 5 0	14 0 0	19 0 0	12 10 0
RF-D or SB	10 15 0	10 10 0	8 15 0	14 10 0	10 10 0
On March 1:					
M in double triangle	13 10 0	15 0 0	11 15 0	21 10 0	12 10 0
RF-C or D-4	16 0 0	17 10 0	13 15 0	23 10 0	15 0 0
RF-D or SB	10 0 0	10 10 0	8 12 6	18 10 0	10 10 0
On June 1:					
M in double triangle	14 10 0	14 10 0	11 7 6	17 15 0	12 15 0
RF-C or D-4	16 10 0	17 15 0	13 15 0	20 10 0	15 0 0
RF-D or SB	10 0 0	10 0 0	9 10 0	16 10 0	11 5 0
On September 1:					
M in double triangle	15 0 0	13 5 0	12 15 0	11 5 0	13 7 6
RF-C or D-4	17 10 0	16 0 0	15 0 0	13 10 0	15 5 0
RF-D or SB	11 0 0	10 0 0	11 0 0	9 0 0	12 0 0
On December 1:					
M in double triangle	15 0 0	11 10 0	16 0 0	12 2 6	16 5 0
RF-C or D-4	18 5 0	13 5 0	18 0 0	14 10 0	19 0 0
RF-D or SB	11 0 0	8 5 0	13 15 0	10 10 0	14 15 0

Exports of jute manufactures (piece goods of all kinds).

Countries.	1889.	1890.	1891.	1892.	1893.
	Yards.	*Yards.*	*Yards.*	*Yards.*	*Yards.*
Norway and Sweden	9,568,200	5,528,900	3,523,000	....	....
Germany	25,668,600	19,480,500	29,318,800	19,444,200	18,788,300
Holland	2,049,000	2,420,900	2,426,000	....	....
Belgium	1,066,400	2,864,500	2,069,200	....	....
France	3,431,300	9,058,700	10,593,200	3,798,900	1,067,400
Italy	707,600	416,900	300,600	....	....
Turkey	3,736,800	6,499,200	4,702,300	....	....
United States	139,479,900	152,429,100	172,977,000	140,930,100	136,003,000
Brazil	15,882,200	12,688,500	7,557,100	....	9,085,500
Argentine Republic	28,379,400	25,820,100	16,392,900	40,638,100	38,281,300
British North America	7,547,700	8,402,800	10,276,400	9,561,600	12,949,400
Other countries	27,547,600	27,831,300	23,824,800	51,165,900	48,811,500
Total	265,084,700	273,441,400	283,961,300	265,538,800	264,986,400

Exports of empty bags and sacks.

Countries.	1889.	1890.	1891.	1892.	1893.
	Dozens.	*Dozens.*	*Dozens.*	*Dozens.*	*Dozens.*
Russia	290,963	93,444	47,944	25,505	30,527
Germany	343,577	331,650	410,161	270,264	295,107
Turkey	214,742	172,198	190,566	218,269	216,150
United States	151,992	83,892	67,790	57,606	45,267
Foreign West Indies	212,189	110,357	85,760	66,703	66,430
Australasia	67,464	158,776	204,093	105,333	161,424
West India Islands and Guiana	135,426	128,999	110,868	108,590	126,863
Other countries	1,694,488	1,592,633	1,477,441	1,231,603	1,326,345
Total	3,110,841	2,671,949	2,594,623	2,083,933	2,268,11

Exports of jute yarns.

Countries.	1889.	1890.	1891.	1892.	1893.
	Pounds.	*Pounds.*	*Pounds.*	*Pounds.*	*Pounds.*
Germany	3,072,500	5,476,800	6,699,900	2,791,400	1,821,600
Holland	1,171,700	1,740,000	1,219,200	....	....
Spain and Canaries	6,986,900	7,240,200	8,502,100	8,851,100	8,551,100
United States	13,994,500	12,220,600	3,449,600	3,415,500	3,121,200
Brazil	....	....	....	....	8,983,200
Other countries	8,953,600	7,835,500	13,321,500	10,660,600	6,948,900
Total	34,179,200	34,513,100	33,192,300	25,718,600	29,426,000

Price of burlaps (10.5 ounces, 40 inch) per yard.

Dates.	1889.	1890.	1891.	1892.	1893.
	Pence.	*Pence.*	*Pence.*	*Pence.*	*Pence.*
January 1	2 1/3 to 2 5/12	2 to 2 1/16	1 3/4 to 1 1/12	2 1/8 to 2 3/16	1 3/4 to 1 13/16
March 1	2 3/8	2	1 3/4 to 1 13/16	2 1/8	1 3/4 to 1 13/16
June 1	2 3/16 to 2 1/4	2 to 2 1/24	1 5/8 to 1 17/24	1 17/24 to 1 3/4	1 13/16
September 1	2 1/6 to 2 5/12	1 11/12 to 1 23/24	1 7/8 to 1 15/16	1 17/24 to 1 3/4	1 3/4

Prices of bagging (18 ounces, 44 inch) per yard.

Dates.	1889.	1890.	1891.	1892.	1893.
	Pence.	*Pence.*	*Pence.*	*Pence.*	*Pence.*
January 1	2 13/16	2 1/2 to 2 9/16	2 1/4 to 2 7/16	2 11/16 to 2 3/4	2 1/4 to 2 5/16
March 1	2 13/16	2 1/2 to 2 9/16	2 1/4	3 to 3 1/16	2 5/16 to 2 3/8
June 1	2 3/8 to 2 7/16	2 1/2 to 2 9/16	2 1/4	2 7/16 to 2 1/2	2 5/16
September 1	2 11/16 to 2 3/4	2 7/16 to 2 1/2	2 1/4 to 2 5/16	2 5/16 to 2 3/8	2 5/16 to 2 3/8

Prices of 14-pound weft yarn.

Dates.	1889.	1890.	1891.	1892.	1893.
	Pence.	*Pence.*	*Pence.*	*Pence.*	*Pence.*
January 1	$2\frac{1}{16}$ to $2\frac{1}{8}$	2 to $2\frac{1}{16}$	$1\frac{1}{2}$ to $1\frac{9}{16}$	$2\frac{1}{16}$ to $2\frac{1}{8}$	$1\frac{5}{8}$
March 1	$2\frac{1}{8}$ to $2\frac{3}{16}$	$1\frac{15}{16}$ to 2	$1\frac{1}{2}$ to $1\frac{9}{16}$	$2\frac{7}{16}$ to $2\frac{1}{2}$	$1\frac{11}{16}$
June 1	$2\frac{1}{16}$ to $2\frac{1}{8}$	2 to $2\frac{1}{16}$	$1\frac{11}{16}$ to $1\frac{3}{4}$	$1\frac{13}{16}$ to $1\frac{7}{8}$	$1\frac{3}{4}$
September 1	$2\frac{1}{4}$ to $2\frac{5}{16}$	$1\frac{3}{4}$ to $1\frac{7}{8}$	$1\frac{11}{16}$ to $1\frac{3}{4}$	$1\frac{5}{8}$ to $1\frac{11}{16}$	$1\frac{3}{4}$

JOHN M. SAVAGE,
Vice-Consul.

DUNDEE, *January 12, 1894.*

PROVIDING FOR THE UNEMPLOYED.

The multiplying of the poor and the increase of the tax for their maintenance are causing such complaint in European countries that various schemes have been started to assist unemployed persons by making them in a measure useful to the public.

In order to give useful guidance to the public in the matter of the relief of the unemployed, it will be necessary to take a general survey of different agencies, each of which attempts to touch the question at some particular point. For this purpose various sources of information will be utilized, and especially the comprehensive and interesting report which has just been given to the public by Mr. Llewellyn Smith, commissioner of labor for Great Britain. In this report special attention is called to two points: First, the description of what is meant by the phrase "unemployed," and, second, to "irregularity of employment," which is one of the primary causes of that congestion of the "unemployed" that make it necessary to have methods and agencies for dealing with them.

The author points out that the word "unemployed" is used in four different senses:

(1) It means persons whose engagements are for short periods, and who, having left one job, have not yet entered on another.

(2) It embraces those who belong to the trades where work fluctuates, and who happen to have fallen on a dull time.

(3) It is applied to superfluous workers in a trade—the men for whom there is really not work enough to give them a livelihood.

(4) It includes those who do not get work because they are idle, inefficient, or worthless.

Naturally, these various classes overlap to a certain extent, and, as the report says—

> One of the most serious features of the situation is the fact that want of employment and casual employment have themselves a powerful tendency to produce inefficiency, both by the physical deterioration due to inefficient nourishment and the moral deterioration which often results from want of regular work.

The ultimate causes of want of employment are classified under the following principal heads:

(1) Fluctuations due to the change of seasons, as in the building trades, where much outdoor work can not well be carried on in frosty weather.

(2) Fluctuations dependent on seasonal changes in other countries with which foreign trade is carried on.

(3) Fluctuations within a period less than a year, as the work of dock and warehouse laborers, which is subject to alternate busy and slack seasons in the course of each year; or the work of agricultural laborers, which has two busy seasons—at the time of hay and corn harvesting—with a slack season in winter.

(4) Local fluctuations caused by the shifting of seats of industry from one center to another, which affects those engaged in that industry in a given place.

(5) Temporary changes in the field of employment caused by the transformation of the processes by which industries are carried on, which, while opening up new avenues of employment of certain classes of labor, displace other classes, who may be unemployed for some time before being absorbed into other occupations.

These being a few of the principal heads under which the ultimate causes of the want of employment may be classified, corresponding variations follow in the possible remedies, if any, which are suited to the various classes of cases. The fact is noted that—

> Taken as a whole, the unemployed margin, however caused, will always consist of the least efficient workers in the community at the given time and place. The worst workmen are, as a rule, discharged first and taken on last.

In the classification of agencies dealing with the unemployed the following groups are mentioned:

(1) The group of agencies of which the trade societies are the most widespread and conspicuous examples, which deal mainly with the efficient unemployed members of various trades, who at any given time under ordinary circumstances are out of a job. These agencies assist such unemployed workmen in a great variety of ways, principally by paying their members a weekly out-of-work allowance and in giving assistance to members in their search for work. Here the report furnishes some most valuable information. It states that during a single year in England 202 trade unions, embracing 680,025 members, distributed what is called "unemployed benefit"—that is, support to their members who were seeking work—to the extent of $1,110,440. The rule as to amount and duration of ordinary unemployed benefit varies in different unions, but may be stated approximately as follows: Full members, $2.50 weekly for fourteen weeks, $1.75 weekly for thirty weeks, $1.50 per week as long as out of employment, unless in case of members under 10 years, to whom benefits shall terminate at one hundred and four weeks in all. Any member losing his employment through neglect of work, drunkenness, or disorderly conduct shall not be entitled to donation,

and if any member, from private objections, refuses work when it is offered him or neglects to apply when informed of a vacancy, he forfeits his donation.

(2) There is a group of agencies which attempts to deal with those who are unemployed owing to trade fluctuations of more or less exceptional character. These are divided into permanent and temporary institutions. The most prominent of the permanent agencies are those which deal not with want of employment as such, but with destitution from whatever cause it may arise. It is not the fact that a man is unemployed, but the fact that he is destitute, that gives him a claim to relief in this group of agencies, which embraces labor bureaus, registries for women and girls, agencies for finding employment for persons out of work, societies for helping discharged prisoners, etc. Of the charity organizations, it is remarked that in most cases these associations decline to relieve ordinary cases of want of employment during a normal state of the labor market, but attempt relief of this kind only when there is such an exceptional state of things that there is not enough work to go around. They draw a sharp distinction between "ordinary" and "exceptional" distress, especially as regards want of employment.

From these permanent agencies for relief we come next to temporary schemes for helping the unemployed. Of these the relief works started by municipal bodies are perhaps the most interesting, but they can not be said to be encouraging. Too often the persons who apply for such work are found to be those whose distress, though it may be real enough, is the result of habits which would produce poverty and suffering in any case. When the municipal works at Glasgow were started, to give relief to the unemployed in 1892, it was found that many of the men were idling, so the system was changed from "time" to "piece" work. The result was surprising. From over 500 men employed the number suddenly dropped to a little over 100, a fact significant of the character of the labor employed. It is quite evident that schemes merely providing a few days' work for a large number of men in successive relays are, of all other, the most likely to be abused, because not affording continuous employment. The result of Mr. Smith's elaborate and valuable inquiry is not to pronounce the problem of providing for the unemployed insoluble, but to suggest that any hopeful solution is less a question of remedying results than of removing causes.

The labor-colony system for the provision of work for the unemployed has assumed considerable dimensions in Germany, Holland, Belgium, and France. These colonies have been established with the view of organizing the labor of the able-bodied unemployed, either temporarily, as in Germany, or permanently, as in Holland. In considering these agencies it is necessary to refer to the economic conditions which influence to a greater or less extent competition for employment. On the Continent compulsory military service absorbs the young men at the time when they would be entering into industrial life, and whatever may be the effect of such a service upon the industrial development of a nation as a whole, its influence upon the labor market is obviously to thin it, and in this way the Government may be said to be practically "providing for the unemployed."

The labor-colony systems are under the control of central boards, which are composed of two representatives from each district or province (township or county) to which the respective systems belong. The management is thus described:

(1) The colonies are institutions of charity, in which any one who has suffered inward or outward shipwreck, or who stands in danger of so suffering, may be received and raised again.

(2) All able-bodied men who are able to work are admitted without distinction of character or religion so long as there is room.

(3) Dipsomaniacs are not admitted, or, if admitted, may be expelled. (Intoxicating drinks are forbidden in the colonies.)

(4) The special aim of the colonies is to secure the permanent elevation of the colonists.

(5) Boarding and lodging must not be in excess of the strictest requirements.

(6) Dismissal is the only form of punishment.

(7) Colonists dismissed for ill behavior can not be admitted into another colony without the consent of the colony which discharged them.

The funds for the support of the colonies are obtained (*a*) from grants by the provincial (local) government, (*b*) from grants by the municipalities, (*c*) from donations and subscriptions by members of the respective societies, (*d*) from collections in the churches, and (*e*) from house-to-house collections. These systems differ in different countries, but as none of them make specia provision for the "unemployed," as such, to consider them further would be out of the scope of this report.

The following table shows that the German colonies between 1889 and 1891 had largely become the resort of the homeless, 62 per cent of those admitted being so described, and that practically continuous residence is very common:

Number admitted in twenty-two colonies between 1889 and 1891.

Description.	Number.	Per cent.
With domicile:		
For the first time	2,730	24.6
Not for the first time	1,423	12.9
Total	4,153	37.5
Without domicile:		
For the first time	3,230	29.1
Not for the first time	3,705	33.4
Total	6,935	62.5
Grand total	11,088	100

From the foregoing it would appear that these colonies are in some respects the counterpart of the "workhouses" of the seventeenth and eighteenth centuries (American almshouses of to-day), only better and more humanely managed; but the scheme possesses more than historical interest in view of the strong tendency which it discovers to experiment along the lines of former unsuccessful attempts, under the impression that an entirely new departure is being made. In Germany there are twenty-six labor colonies distributed throughout the Empire (three of these being Roman Catholic and the remainder Protestant) and more than one hundred and fifty relief stations where the applicant for relief is required to do some light work for which he receives money or an order for food and lodging. In regard to the character of the work performed, it is generally road-making and wood-chopping, for which no satisfactory substitute has yet been devised.

Labor colonies have also been introduced into Holland (the first Dutch labor colony was founded in 1818), Belgium, Switzerland, and Austria; but, as the system in these countries does not contemplate any special provision for "unemployed," being merely projects for the care of all classes of indigent persons, to consider them in detail would be outside the scope of this report.

In France the first labor colony was founded in January, 1892, at La Chalmelle, department of the Marne. The farm of La Chalmelle is situated about 50 miles from Paris. The land upon which the colony has been established contains an area of 316 acres, which is under a lease to the city of Paris. It is intended to make upon the farm improvements to the value of $6,000, the city paying interest at the rate of 3 per cent per annum upon the capital employed. The total cost of the colony for the year 1892–'93 was $6,500, the receipts from the sale of produce were $3,500, and the net cost of the colony for the year was $3,000. Wages are paid at the rate of 10 cents per day. Clothes are supplied free on entrance, but subsequent requirements are debited to the colonists. Admission into the colony is reserved for those who are recommended by the directors of the night refugees in Paris, who form an opinion as to the willingness to work of those whom they shelter temporarily, and, after making inquiry into their antecedents, send them to the colony. Such inquiry is necessary to prevent the colony from becoming the resort of professional vagabonds. The total cost of food per day per man is 25 cents. The net cost in money per day per man is 16 cents. Fire, light, washing, etc., per man per day costs 4 cents. Thirty-three per cent were placed in situations by the colony.

In most of the continental states the supply of farm labor is, on the whole, much lower than it was ten or fifteen years ago. Men and women are leaving the country and going to the towns. Farm labor has become distasteful. By the laborers themselves slight importance is attached to the healthy character of country life in comparison with various branches of town labor. That phase of the question sinks into insignificance in their estimation. Only the shorter hours, numerous holidays, and bustle and excitement of town life or the neat uniform and genteel work of a policeman, a railroad porter, or the domestic are ever present to the minds of farm laborers.

The depopulation of rural districts and overpopulation of towns have gone so far that steps are being taken to divert its course toward foreign lands rather than have the towns crowded with idle hands; hence the large and constantly increasing number of emigrants who are seeking homes in America, and hence the moral and intellectual superiority of the emigrants of to-day, taken as a whole, over those of a few years ago.

C. W. CHANCELLOR,
Consul.

HAVRE, *December 4, 1893.*

RUSSIAN MEASURES CONCERNING GRAIN PRICES.

It may be of value to the agricultural interests of the United States to group all that has been done by the Minister of Finance for regulating the prices of grain in Russia, and thus present a general view of such conditions of the grain trade of 1893–'94 as are more or less influenced by the Government.

The first step taken to this end was the establishing of a new schedule of freight rates for grain transport. As is already known, one of the reasons for making these changes arose from the desire to bring about a general reduction of the transportation rates; but the principal reason grew out of the need of making the tariff more uniform and of annulling the former freight rates, which favored one or another route for the grain cargoes, according to considerations often entirely foreign to the real interests of trade.

The establishing of uniform rates for moving grain on the railroads only by accident fell in with the temporary circumstances of the present contingency; in reality it forms part of the measures taken by the Government for arranging the freight schedules and continuing the work begun much earlier, that is, since the opening of the tariff establishments in 1888. In view of the special circumstances of the present year, namely, of the difficulties which the Russian export trade meets on the Prussian frontier, an arrangement was made with the Austrian railways, according to which the transport rates of grain going direct to Switzerland, Italy, and France were lowered. This reduction, about half a cent per ton per kilometer, forms about 5 cents per car per verst (two-thirds of a mile), that is, 15 to 20 per cent of the former rates. Moreover, the cargoes going by this route are free from other expenses, such as of loading and unloading, of running on the branch lines, etc. All these privileges are adapted, as far as concerns oats, not only in transit, but also for its transport to the interior stations of the Austrian railroads.

In order to facilitate the transport of Russian grain to the Austrian and Roumanian frontier points, the general freight rates in force on the Russian railroads are reduced 30 to 40 per cent for cargoes going to such points. This lowers the expenses for distances above 1,000 versts by $25 per car and 4.5 cents per pood (36 pounds). Thus Russian producers who used to send their surplus grain to Germany, have the possibility of sending it to other European markets. By these means, however, the exclusively unfavorable conditions of the Russian grain-export trade were made somewhat easier.

This year the harvest of grain is satisfactory over all the Empire, with a few exceptions, and in some localities even excellent. A probable consequence of this may be increased offers of grain on the interior markets, which will be followed by a lowering of the prices of such products. Although similar cases occur every year when there is a good crop, this year the decline in the prices will be especially strong, as, owing to the bad harvest of 1891, and consequently the exhaustion of the grain stores, the prices of grain have been, up to the present time, above the yearly normal.

Independent of the above-mentioned circumstance, owing to which a decline is expected, the following facts, which will undoubtedly tend to a decrease in the demands for grain and consequently to a still greater decline in prices, should also be mentioned.

As is already known, the German Government established defferential freight rates, according to which Russian grain imported into Germany has to pay a much higher duty than grain coming from all other countries, namely, wheat and rye by 4½cents per pood and oats by about 4 cents per pood. Moreover, the German Government has given an order since the 20th of July last to increase by 50 per cent the duty on products imported from Russia, of which the principal is grain. Of course, such an advance in the duty on cereals must needs hinder, and perhaps even bar entirely, its import into Germany, which was formerly the principal market for the sale of Russian rye. Owing to such a position of affairs, the Ministry of Finance tried to find measures for removing, or at any rate for ameliorating, the unfavorable consequences of the above-mentioned circumstances. The principal of these measures is to prevent a too abrupt decline of the grain prices, influenced by the increased demand directly after the harvest. It was therefore found expedient to keep away from the market at least a considerable portion of the surplus grain, which otherwise would be offered in haste. To this end, first of all, the Ministry of the Interior, in the middle of July, called the attention of the several governors to the necessity of reëstablishing the natural grain stores which belonged to rural societies and which were practically depleted, owing to the bad crops of the preceding years. This is to be attained in two different ways: (1) By returning the grain borrowed, where the general stores exist, and by filling other storehouses; (2) by inducing the rural societies to accept a grain tax in those districts where the keeping of grain stores had been annulled, instead of carrying a cash alimentary capital and taxing the peasants in money to raise this capital. Until 1891, during a considerable period favorable to the general food supply, the system of cash reserves instead of grain stores was much developed among the rural associations, and many storehouses where such grain had been formerly preserved were destroyed. At the present time, after the famine of 1891–'92, to a considerable extent due to the want of grain stores, it is contemplated that the rural associations shall return to the former system of storing and grain reserves. Such a return will be a complicated procedure, owing to the fact that the decision to substitute a grain tax for a money tax for rural reserves must be presented to the Ministry of the Interior after having passed through the hands of the district and Government boards and that of the local governor. To simplify this procedure, the Minister of the Interior has given due orders to this effect to the Government representatives; furthermore, the Government agents are ordered to allow the peasants at their option to substitute rye for the quantity of oats or other spring grain that they must give to restore the common grain reserves.

Moreover, the Ministers of Finance and of the Interior have solicited the imperial permission for giving the zemstvos the right of collecting the land tax from peasants in grain instead of money, and that, furthermore, in order to give the zemstvos means to meet the necessary expenses, a credit should be opened for them in the Government Bank at the low rate of 3½ per cent per annum and to the full amount of the sums they were entitled to receive in grains. The loans thus made must be returned to the bank out of the money received from the sale of the grain or, if necessary, from special taxes, and not later than June 1, 1894.

The harvesting of grain in such considerable quantities as would be in the hands of the Government if the taxes in money were replaced by those in grain, as well as the storing of it, its preservation, and the like, are such purely agricultural and private operations that it is difficult to bring such regulations under Government control. This consideration, however, is of little concern to the zemstvos, as the quantity of grain which would replace the money taxes imposed on the peasants by the zemstvos would be comparatively small.

GOVERNMENT LOANS AGAINST GRAIN.

Other measures were undertaken by the Government in the support of the agricultural interests. One of the most important of these consisted in giving loans against grain, in order that the peasants should not be compelled to sell it immediately after the harvest and at the same time have money sufficient to enable them to go on with their farming. The principal reason of the present unfavorable conditions for the grain-producers lies in the fact that they are forced by circumstances to sell the grain immediately and are therefore unable to wait for better prices. Such a credit will attract the parties interested and be of real use only if its conditions are sufficiently advantageous, that is to say, if the interests on the loans can be covered by sustaining the prices of grain and leave the peasants a profit on the operation. In this respect the loans against grain given by the Government Bank are as favorable as possible to the borrowers. But, on the other hand, the whole practical organization of the loan banks, according to the present statute, is not such as to make it possible to give out loans against grain in such sufficiently large sums as would correspond to the present requirements. Furthermore, another operation practiced by the Government Bank, with the aid of railroads, namely, the giving of loans on grain cargoes, which is in general much more successful, may be able to give more favorable results if the grain agents were given Government credit. Therefore, the Ministry of Finance has already taken measures to enable the railroads passing through the principal agricultural regions to assist materially in this matter. However, admitting that the railroads furnish important aid to the Government in the solution of this problem, their activity in this direction forms only a part of the measures which must be taken for attaining the desired end. With the present conditions, when the export of Russian grain, especially of rye, is practically prohibited by the enormous German import duties thereon, the principal aim must be to hold the grain stores as near as possible to the place of production. For this reason it is necessary to give loans, not only on such grain as is brought to railways, but also to the nearest trade stations and even on the grain which remains with the producers.

In organizing such a credit the Ministry of Finance thought it advisable to propose to private bank establishments to take part in this undertaking. Some of these establishments have already given, during recent years, loans on grain, and these operations have attained favorable results. But private banks have not the facilities to develop these operations to the extent the present conditions require. On the one hand, their means are not sufficiently great for them to give large sums as loans against grain, as they need their money in more advantageous and less complicated operations; on the other, they can not give loans on terms that would prove especially profitable for the grain producers. As they are principally commercial establishments, these banks desire to get as much profit as possible from the money they loan out, and a large proportion of their money thus loaned would have to be borrowed at high rates of interest.

Owing to these considerations, the Ministry of Finance came to the conclusion that, in order to induce the private banks to take an active part in these loan operations, it would be necessary to provide them with capital and allow them their expenses in making the loans and collecting a fair profit on the transactions, demanding, however, that only the legal rate of interest be charged to the farmers.

For this, by a special imperial permission, granted after a report made by the Minister of Finance, the Government Bank opened a credit to private commercial houses, in order that these latter might be induced to give loans against grain. These credits are opened independent of the general commercial credits. For this the banks are bound to give loans to borrowers at a lower rate per cent, all the great trade centers being divided into two categories, of which in the first the banks are to take 5½ per cent per annum and in the second 6 per cent. The differences in the rates per cent in the two categories have been established in view of the fact that in localities of the second category, which are less adapted to grain trade, the expenses of the loan operations will be much more considerable than in those of the former. In all other localities which do not enter into the above-mentioned categories the banks are permitted to take more than 6 per cent, dependent upon the amount of the expenses which will have to be made in the different localities for such transactions. Even at such an increase of the rate per cent, which in every case must be moderate, the new loans on grain will be much more advantageous than the former, where the rates, including all expenses, amounted often to 20 per cent.

Concerning the form of profiting by the loans on grain, it is necessary to have in view that in giving such loans the banks are bound to take from the borrowers, besides the loan document in general use for guarantying the merchandise hypothecated, a bill of exchange, which, together with the papers from the private banks, are to be transmitted to the Government Bank. The necessity of requiring supplementary obligations—bills of exchange—is due to the fact that, in order to greatly develop this operation, the private banks are ordered to give loans on grain with as little formality as possible, for experience has shown that these formalites are a great hindrance to the successful development of the operation. But, on the other hand, the interests of the creditor require a guaranty for his loan. Therefore, in order to satisfy both parties, it has been found necessary to give these loans on bills of exchange, which would guaranty their prompt and full payment and thus make a strict supervision of the grain hypothecated unnecessary.

In order that the loan given should be of actual use to the farmer and remove the necessity of selling his grain at a sacrifice, it has been determined that the loan should not be less than 50 per cent of the local value of the product.

These loans are made on time not to exceed nine months; besides this, for the benefit of the borrowers, the banks are allowed to open on similar conditions, that is, against the bills of exchange, with a guaranty of the grain mortgaged, credits in the form of special current accounts. The advantage of this form of credit is that the borrower, before the term of the opened credit, can borrow on account of it necessary sums, repay them in installments, and then reborrow. The per cent taken for such a credit is calculated according to the sums borrowed and the time of the actual use of these sums. But in order that the banks may not lose, the per cent is reckoned for not less than thirty days. It should be understood that, according to the above plan, loans on grain will be given to farmers and also to grain dealers. Of course, the latter would profit by this system much more than the farmers, and herein, it would seem, lies a serious objection to this scheme, as the middlemen are already an unprofitable necessity to the farmer in Russia. Nevertheless, these operations will be in a considerable degree advantageous to the landowners, as the grain traders will thereby have greater facilities for buying grain, the demands on the markets will increase, and the prices of grain will advance accordingly.

RULES GOVERNING GRAIN LOANS, ADOPTED BY THE GOVERNMENT BANK BRANCHES AND THE ZEMSTVOS.

(1) Small landowners, as well as peasants' communities owning land, that is to say, folkland, and also independent peasant farmers may profit by loans from branches of the Government bank through the zemstvos.

(2) The district zemstvo, represented by the district board of landlords, acting on the basis of regulations lawfully formed and duly confirmed at the county councils, may take upon themselves the mediatorship between the borrowers mentioned in the first paragraph and the branches of the Government Bank for defining the dimensions of the loans on grain, as well as its preservation. As mediators the zemstvos become responsible to the branches of the Government Bank as to the quantity, quality, and the safety of the grain hypothecated. Such a guaranty of the zemstvo takes the place, in the establishments of the Goverment Bank, of those measures of preserving the mortgages and means of defining their quality and quantity which are shown in the regulations confirmed by the Minister of Finance on August 2, 1893, and which require an immediate relation between the borrowers and the branches of the Government Bank.

(3) The district board of landlords, wishing to take upon itself the mediatorship mentioned in paragraph second, must declare its intention to the proper branch of the Government Bank by presenting an ordinance, confirmed by the governor and issued by the county reunion, authorizing the board to take upon itself the said agency to an extent defined by the council and shown in the protocol, as well as the guaranty mentioned in the second paragraph, before the establishments of the Government Bank. Furthermore, the district boards must present to the branches of the Government Bank their estimate of the amount of loans required through the mediatorship of the zemstvo.

(4) The office or section, having received from the board of landlords its estimate of the amount of the loan required, as well as the declaration of its intention to take upon itself all the guaranty mentioned in the second paragraph of the regulations governing all the loans which will be given out through its agency, examines these declarations and estimates through a discount committee, through the aid of members of the discount committee in charge of the giving of loans to landowners on single bills, and through the aid of other expert persons not belonging to any discount committee and invited to take part in the meeting. This latter appoints the limit of the total amount of the loans. The offices and sections present their conclusions concerning the dimensions of the credit to the Government Bank for confirmation and begin to make loans accordingly on account of the open credit, but to such an extent only that the total amount of the loans should not exceed half of the credit, until the latter be confirmed by the Government Bank.

(5) Each separate loan is given to the borrower who has applied to the board of landlords, after the board has issued an order to that effect, in an

amount not exceeding 75 per cent of the cost of the grain hypothecated, according to the local valuations. All changes in the prices are to be communicated to the boards, in order that the Government Bank sections which make the loans may regulate their estimates accordingly.

(6) Each loan permitted to be made must be fortified by a certificate presented to the local section of the bank, in which the board declares the standard of the grain to be hypothecated in a form given in the fourth paragraph of the present rules, together with a mortgage deed from the borrower to the Government Bank section, which must designate that the local zemstvo is responsible for the safety, the quality, and the quantity of the grain to be hypothecated.

(7) Moneys thus loaned are sent by the bank section to the zemstvo, which either gives it to the borrower, if there is only one, or distributes it, if it belongs to a whole peasants' community, between its members. In the latter case the distribution is done in the presence of the proper authorities. The refunding of the money borrowed to the bank sections is also done through the agency of the zemstvo.

(8) In order to hasten the giving of the loans to the borrowers, the former being appointed according to the fifth paragraph of these rules through the agency of the zemstvo, the Government Bank sections give to the zemstvo special facilities in the form of advance money and in amounts advised by the discount committee of the given section. This advance money, as it is loaned out by the zemstvo, is reinforced by new advances, but only as the latter are fortified by certificates presented by the zemstvo to the Government Bank sections according to paragraph 6 of the instruction, and showing the standard of the grain received by the zemstvo as guaranty for the loans, as well as the mortgage deeds to cover the same.

(9) The interest on these loans must be paid by the borrowers to the zemstvo at the rate of 3½ per cent per annum, payable monthly, the current month being counted as a full month. Moreover, the borrowers must pay the zemstvo for the insurance and safe keeping of the guaranties. The zemstvo pays interest to the Government Bank sections at the rate of 3½ per cent per annum from the time the money was in actual use.

These supplementary regulations simplify the operation of loaning money against grain to such an extent that the plan is now accessible to all. The present regulations differ from the former by an absence of formalities and by the offering of new facilities with regard to the methods of guarding the grain hypothecated. According to the new rules, declarations for the receipt of loans may be presented not only to the bank sections direct, but also to persons especially appointed for that purpose; thus the credit is much more accessible. The regulations of August 2 allowed the grain pawned to be kept in the stores of the borrower at his responsibility, but with considerable restrictions and on condition that the grain pawned should be kept apart from the other grain and in stores where there are no other goods. The supplementary regulations go still further, permitting, as a general rule, the leaving of the grain pawned to the responsibility of the borrower himself and allowing the grain to be stored together with other goods, as well as with grain not forming part of the mortgage. If the borrower is known to the bank section to be trustworthy and responsible, and, furthermore, if the grain is stored near the bank section or near the residence of the bank agent, where it can be easily examined, then the bank section need not put the grain under official seals and may give the key to the owner of the grain, on condition that it be returned in the evening to one of the officials of the bank. This regulation is very important in that it gives the borrower an opportunity to show the grain hypothecated to all prospective purchasers without delay or embarrassment. If a landowner has a storehouse in which he heeps grain together with other products, as is generally the case, he may secure a loan against any part of his grain without separating it from his general stores.

Furthermore, the supplementary regulations give new facilitations in case the grain is in the care of a responsible *artel.* This peculiar Russian organization, necessitated by the conditions of Russian life, thus gets a new impulse for its development. The responsible *artels* serve as right hands to the Government Bank sections, performing many such duties as were laid before on officials of the bank. The examining of the grain mortgaged, as well as the verifying of its quantity and quality, can be intrusted, according to the supplementary regulations, to the *artelschik* employed in the *artel,* and probably in the future this work will be done only in this way.

The dimensions of the loans, according to the new regulations, may amount to 75 per cent of the value of the grain, while formerly the bank gave not more than 60 per cent. The moneys may be given not only direct from the bank sections, as before, but may be sent through the treasury or by registered post, according to the wish of the borrower. The loan may be taken by the borrower either at once to its full amount or in parts on a special current account. The paying back of the loan may also be done in parts. The total interest on the loan is appointed by the bank, according to circumstances and locality, and may vary from 4½ to 6 per cent per annum. All the above-mentioned changes of the former rules governing grain loans considerably facilitate the operations. It is intended to give the greatest liberty of action to the officials of the bank sections in the several localities.

The remaining paragraphs of the new regulations only explain more precisely the details of the rules of August 2, 1893. Here the paragraph showing what is to be considered as local prices, on which the amount of the loan is based, is the most important. The supplementary regulations definitely confirm that local prices will be considered such as are accepted by the discount committees, according to information given by the zemstvo or by the exchange, where there is one, as also according to the latest actual sales made in that locality.

Although the regulations of August 2, as well as the supplementary regulations, have been published as being only temporary, still there is no doubt that they both have made an important beginning for placing the loan against grain in Russia on a solid footing. As is known, this business did not prosper sufficiently under the former regulations, confirmed in the beginning of the eighties. Owing to the temporarily uncertain position of the interior grain market, the demand for loans against grain is general in the whole of the agricultural world, and, as the Government has made all possible facilities for procuring cheap loans, there is no doubt that many will profit thereby, awaiting a more favorable time for the sale of their stores. Now, forced by circumstances, people will examine closer this operation and get accustomed to it, and later on, even when the conditions of the grain market become normal, they will profit by these methods, in order not to become dependent on the grain middlemen. Thus, under pressure of need, a beginning to a new regular organization is being laid in the Russian grain trade.

It is very difficult to follow the practical results of these measures, namely, their influence on the prices. But, nevertheless, it should be noticed that the prices of grain—at any rate of rye and oats, which should suffer most—are no lower now than they were in the normal years of 1887 to 1889. The fact that the grain-producers know that there is no need of selling their grain in haste has undoubtedly sustained the grain prices to a considerable extent. It is interesting to note that the prices of wheat have been greatly influenced by the money crisis in the United States, which have exported to Europe 200 per cent more of this grain than in 1888 and 1889, so that in consequence the prices on the international market have greatly declined.

The measures taken by the Ministries of War and of Finance to organize an immediate sale of the grain to the intendancies should also be mentioned. The Ministry of War is a purchaser of grain to an enormous extent, but in normal years the grain passes through so many hands before it gets to the intendancy that a direct sale from the producer would be of great advantage to both parties. For this reason it has been determined to lay in for the troops a much greater quantity of grain than usual. According to the rules of August 2, the mediators between the grain-producers and the intendancy are the zemstvos, on whom the success of this whole enterprise must depend. It is impossible for the intendancies to have to do with thousands and tens of thousands of traders and middlemen, and therefore Government boards are appointed to look after grain supplies for the army. The Ministry of War will fix the prices at which grain of necessary quality, with reference to weight, purity, and degree of humidity, will be bought in the different districts. The said Ministry will also determine in advance the quantity of grain needed in a given locality during a certain year. The zemstvos receive in advance 90 per cent of the value of the whole quantity of grain they bind themselves to supply. The grain thus bought by the intendancy is stored by the zemstvo at special rates until it is delivered to the army stations, after which the remaining 10 per cent is paid. In governments where there are no zemstvos, the grain will be supplied to the intendancies through commercial agents attached to railways.

On the grain-producers themselves, represented by their zemstvo, will depend much of the success or failure of this scheme of the Government to maintain grain prices in the Empire.

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *December 15, 1893.*

BRUSSELS PAWN OFFICES.

Being in frequent receipt of letters from parties in the United States soliciting information as to the organization and administration of pawn or loan establishments in this city, I have thought it advisable to embody in a report such data bearing on the subject as might be of interest.

EARLY HISTORY.

As early as the twelfth century usury was practiced to such a degree in this country that many communes were in an almost complete state of bondage. The development of industries and commerce was interfered with, and the scarcity of money and loss of public credit were attributed to its baneful influence. Until the commencement of the thirteenth century usurious loans on pledges were exclusively carried on in Belgium by a certain class of money-lenders. About this time the Lombards appeared in this country and established their institutions. Money-lending, which prior to this time had been only tolerated in principle, was recognized and almost legally organized. Concessions and licenses were granted by the Prince, who received from the money-lenders stipulated dues. It is not shown that the interest received by the money-lenders (Lombards) was ever less than 30 per cent, but it is stated that they frequently exacted a higher rate, and at times received as high as 130 per cent. A few local trials for the organization and official establishment of pawn shops were made in some of the provinces of Belgium during the latter part of the sixteenth century. By official order dated May 8, 1600, the existing rate of interest—33 per cent—received by the Lombards was reduced to 21 per cent. In 1618 pawn shops were organized in most of the cities of Belgium, but the rate of interest demanded is not shown. During the French invasion, these pawn shops, mistaken for the old and pernicious institutions of the Lombards, were seized, suppressed, and capital confiscated. The evil already caused by usury now increased until it became a calamity, in consequence of which, at the beginning of the present century, the Government granted the right to reëstablish pawn shops. The Brusseis Mont-de-Piété was reopened in 1810, since which time it has uninterruptedly exercised its functions.

GENERAL ORGANIZATION IN BELGIUM.

The law of 1848 did not permit pawn shops to assume the character of an institution, but only that of an establishment of loans on pledges. The capital for administration was furnished by the communal banks and bureaus of charities. The profits were to be capitalized so as to form a fund which would assure to the service of loans a sum sufficient to reduce the annual interest tax. In case of the suppression of a pawn shop, the capital was returned to the public charities (hospitals and benevolent associations). In 1851 loans of from 2 to 200 francs were made at 15 per cent per annum, while loans exceeding 200 francs paid a less rate of interest. Since January 1, 1892, the legal rate of interest on loans has been 6 per cent per annum. Pawn shops in Belgium are organized under the direction of the communal council, which approves the budget and accounts. All organic rules prescribed for the management of the business are submitted for approval to the State Government, which exercises a strict supervision over all pawn shops. Each pawn shop is divided into four important services or departments—(1) director's office, (2) appraiser's division, (3) stores or storerooms, and (4) redeeming office.

PAWN OFFICE.

This office is under the management of three appraisers, one of whom is required to be an expert gold and silver smith, and one assistant to the latter, a bookkeeper charged with the records of the office, a cashier, and assistant cashier, who keeps a record of the sums loaned. The appraisers receive and examine the object to be pawned and determine the amount to be loaned. If accepted, the borrower receives a numbered ticket, to which he affixes his initials and flourish. On presenting this ticket to the cashier, and after complying with certain formalities, he receives the amount loaned. The ticket which has been delivered to the borrower by the cashier is separated into halves, one of which is returned to the borrower and the other attached to the object pawned, which is at once sent to the storeroom.

To prevent as much as possible the pawning of stolen articles, the management has adopted the following resolutions:

(1) When the value of a pawn is 20 francs ($3.86) or more, the borrower is obliged to produce a document clearly establishing his identity.

(2) A description of the goods pawned is written on the ticket and attached to the pawn, and also inscribed on the record books of the pawn office.

(3) A list of such goods is publicly posted in the pawn shop during three weeks.

(4) The appraiser is held responsible for the loss of all goods after they have been recorded. Appraisers, cashiers, and storekeepers are required to keep a daily record of the transactions of their respective departments. These lists are collected and compared daily before the evening closing. They must give identical totals.

TRACER.

The tracer, or central record office of pawns, is independent of the pawning or redeeming departments, although lists of loans and redeemed pledges are daily sent to it. The method of tracing employed is very simple. It consists in affixing anumber opposite to the date of pawning or redemption. This is styled a tracer. A traced pawn is one either redeemed or sold after the expiration of term furnished by the records of unredeemed pawns and which in consequence of forfeit must be sold. The storeroom must produce all forfeited pawns.

STOREROOM.

Lots are verified and classified by order of date of loan and daily number. Special attention is given to pledges requiring extraordinary care, as well as to those of unwieldy bulk. No article is permitted to leave the storeroom until a ticket for it and proof of identity of borrower are produced. The ticket known as a "court billet" (short ticket) is held by the borrower; the remaining half, designated as "long billet" (long ticket), is attached to the article in pawn.

The storekeeper makes note of every pawn going out, in order that his list may tally with the daily record of the redemption office and at the end of each month agree with the list kept by the tracer of unredeemed and forfeited pawns destined to be sold.

REDEEMING.

The borrower presents his ticket, or "court billet," for which he receives a "contre billet," that is, a ticket indicating the sum he is to pay. He is required by law to affix a revenue stamp to this ticket before presenting it to the pay receiver. The stamped ticket is then delivered in exchange for the pawn, which, still bearing the "long billet," is taken to the redeeming office to be returned to the borrower. The "contre billet," or control ticket, of the borrower is placed with the "long billet." Thus the borrower receives his pledge, the storeroom the "contre billet," and the redemption office the "long billet" and "contre billet" establishing that payment has been made and the article pawned delivered to the party interested. The records of the redemption office are constantly verified and balanced with the receiver's books in such manner as to avoid error. Each day the total records of redeemed pledges and of the storeroom must tally.

SALES.

Sales are public and periodical. No object can be sold until the expiration of fourteen months, dating from day of pawning. Purchasers pay 5 per cent over and above the sum paid, which is employed by the institution to cover expenses of sale. Silverware, jewelry, bronzes, etc., are exposed for public inspection the day preceding sale. When an article does not bring four-fifths of the sum loaned, it is withdrawn and offered again at the following periodic sale—that is, if the article has been pawned for a sum exceeding 25 francs ($4.83). When an article is put up for sale it is described, and, if jewelry, quality and weight stated. The auctioneer numbers and registers the "long billet," and then submits the article to the inspection of the public, after which it is disposed of by auction. After sale a second record is made as to the nature of the article and result of the sale, and a receipt is then delivered to the purchaser.

SURPLUS.

After each sale an accounting is made of the surplus, that is, the amount which remains after original sums, with computed interest thereon, are deducted, as well as all expenses connected with the sale. Holders of tickets of unredeemed or forfeited pledges have the amount due them written on said ticket, which they receive from the cashier in exchange for the ticket. When the sale is unprofitable the establishment appropriates the entire amount accruing from sale. Surplus not claimed within two years after a sale reverts to the establishment.

TICKETS.

When an object is pawned the borrower receives a ticket printed in double, containing space on the right, as well as the left, for date, description of pawn, register number, and amount borrowed. These tickets are printed with a large capital letter very nearly in the center. The left half, called "court billet," destined for the borrower, is smaller than the right half ("long billet"), which is attached to the article pawned. The ticket is separated exactly in the center of the capital letter, which, when united, represents the identity of the ticket.

APPROXIMATE TRANSACTIONS.

The Brussels pawn shop responds to the demands of a population amounting to nearly 500,000 inhabitants. The following shows in round numbers the transactions for one year:

EXPENDITURES.

	Francs.
Pawns (360,000)	5,250,000
Personal salaries, pensions, etc	120,000
Materials, keeping buildings and furniture in repair, office expenses, insurance, etc.	15,000
Total	5,385,000

RECEIPTS.

Pawns redeemed (350,000)	5,000,000
Sales (10,000)	250,000
Surplus lost by limitation	15,000
Interest collected	250,000
Total	5,515,000

GEO. W. ROOSEVELT,
Consul.

BRUSSELS, *December 4, 1893.*

SAUSAGE-CASING INDUSTRY IN RUSSIA.*

According to instructions from the Department, the following report on the sausage-casing industry in this city has been prepared.

At the outset I wish to say that I have found it practically impossible to learn the details of this business in Russia, principally because the industry is not separated from that of the butchers in the official returns. At the Ministry of Finance I was able to gather only the most meager information. Their books and publications were consulted in this interest, but with no further result than the discovery that the industry is not separately listed. Even the exports come under the general head of meat products.

After visiting several of the sausage shops and some of the smaller establishments where sausage is manufactured, I learned that all casings were bought in a thoroughly prepared condition of a firm of this city by the name of Wüst & Co., Zabalkansky, 88. I then took pains to have an interview with Mr. Wüst, but, I regret to say, with very unsatisfactory results. He positively refused to give any details whatever of his business and seemed to have a dread that some American company would injure his export trade into southern Europe. He even complained that there were companies in the United States that were interfering with his business in Germany, France, and Spain. I did my best to disabuse his mind of the opinion that a description of this industry published in the United States would be prejudicial to his interests. I even tried to convince him to the contrary, and suggested that this might be a means of opening up a direct trade in America for the casings made from the large Siberian and Caucasian cattle. These efforts, however, were of little avail, as I have been able to learn nothing of the methods of conducting his business, except in a general way. He assured me that practically the entire business in Russia was in his hands. He admitted the existence in the Empire of two or three other establishments in this line, but that they were of insignificant proportions. He said that the only one worthy of mention was located at Odessa, but that this firm was able to do little more than supply the local demands.

The animals used for sausage casings in this country are sheep, calves, cows, oxen, and pigs. The sheep and pigs are generally full grown when killed. Young cattle are used in this industry, ranging from 4, 5, and 8 weeks to 1 year. In fact, the intestines, in general, of the slaughterhouses of this city are worked up by Wüst & Co. into casings, those of the larger cattle being the more desirable, and commanding, therefore, higher prices. The larger casings are secured from the Siberian and Cherkask cattle, weighing from 1,200 to 1,500 pounds, which are slaughtered there at the age of 5 or 6 years; and the intestines, rudely cleaned and packed with sufficient salt to preserve them, are bought in this condition by Wüst & Co., of this city, who claim to have a special and secret process for cleaning and preparing them for the market. Mr. Wüst admitted that he puts these casings through eighteen different hands or processes, and seemed to be convinced that his was the only proper method of preparing sausage casings. He seemed to lay particular stress upon the fact that all of his goods were hand prepared and that their peculiar whiteness is due to the salt used in the treatment. I learned from him that he has a large export trade to Germany, France, Spain, Belgium, and Holland, and that the casings from the large Siberian cattle are practically all sold abroad. Wüst & Co. admitted only to thorough cleaning and treatment with chemicals and that their goods are all carefully assorted as to sizes and species of animal producing them. When the treatment of the casings is complete, they are dried, assorted, salted, and thoroughly preserved, and then packed in different cases so that they may be shipped any distance and kept for months without fear of deterioration. These cases are then carefully labeled with marks and numbers indicating their quality and are offered on the market accordingly. Wüst & Co. claim to supply the bulk of the interior market. They have buyers of intestines in bulk and agencies for the sale of the goods in all the prominent centers in Russia of this industry.

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* See "Sausage Casings in Foreign Countries," No. 158, pp. 381–415.

By examining the list of exports I find that no sausage casings are sent direct to the United States. Wüst & Co. admitted that they have no connections there; they pretend, however, that their buyers at Hamburg send a considerable quantity of their large Siberian and Cherkask cattle casings to the United States.

I was unable to learn anything of importance with reference to the values of these goods. It appears that the prices vary irregularly with the supply and demand for the different sizes and qualities, the smaller being the cheaper, and, as said above, those from the large Cherkask cattle being the dearer. The market values at home are by no means constant. The casings are sold by the pood (36 pounds), according to the size, species, and qualities demanded.

It is a matter of considerable surprise to me that an industry so large and important as this appears to be should escape being registered under the Ministry of Finance, where a very sharp lookout is given to every form of Russian manufacture and trade.

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *December 20, 1893.*

AGRICULTURE IN THE UNITED KINGDOM.

The tables submitted herewith were compiled from the published returns of the board of agriculture of the United Kingdom for 1892 and 1893. They are interesting as showing certain conditions of the agriculture of Wales and the United Kingdom.

Total area, acreage under each crop, and number and kind of stock in Wales and the United Kingdom June 5, 1892 and 1893.

Description.	Wales.		United Kingdom (including the Isle of Man and Channel Islands).	
	1893.	1892.	1893.	1892.
	Acres.	*Acres.*	*Acres.*	*Acres.*
Total area of land and water	4,779,343	4,779,343	77,642,099	77,642,099
Total acreage, all crops*	2,855,972	2,859,803	47,979,698	47,977,903
Grain:				
Wheat	54,562	55,278	1,955,213	2,298,607
Barley	111,851	114,520	2,251,293	2,220,243
Oats	240,865	233,399	4,435,944	4,238,036
Rye	1,301	1,352	69,526	61,392
Beans	1,637	1,570	248,304	315,413
Pease	1,266	1,264	210,900	195,010
Total	411,482	407,383	9,171,180	9,328,701
Green crops:				
Potatoes	35,024	36,510	1,262,674	1,276,835
Turnips and swedes	71,387	70,949	2,286,473	2,245,998
Mangolds	7,484	7,917	394,543	413,334
Cabbage, rabi, and rape	1,819	1,928	203,270	198,895
Vetches or tares	2,058	2,019	181,152	204,399
Other green crops	1,249	1,352	134,643	127,654
Total	119,021	120,675	4,462,755	4,467,115
Clover, sainfoin, and grasses:				
For hay	168,403	179,069	2,701,846	2,772,065
Rotation, not for hay	149,432	159,299	3,214,503	3,201,391
Total	317,835	338,368	5,916,349	5,973,456
Permanent pasture:				
For hay	499,009	491,863	5,803,011	6,018,308
Not for hay	1,499,397	1,491,067	21,897,370	21,515,018
Total	1,998,406	1,982,930	27,700,381	27,533,326
Flax	3	8	68,715	72,065
Hops	....	....	57,565	56,259
Small fruit	1,004	1,040	65,845	62,547
Uncropped arable land	8,221	9,399	536,908	484,434
	Number.	*Number.*	*Number.*	*Number.*
Horses used solely for agriculture	77,142	78,638	....	....
Unbroken horses	57,218	57,568	....	....
Mares, for breeding only	12,984	12,621	....	....
Total	147,344	148,827	2,079,587	2,067,549
Cattle	738,608	754,467	11,207,554	11,519,417
Sheep	3,101,890	3,197,501	31,774,824	33,642,808
Pigs	200,676	197,302	3,278,030	3,265,898

* Including fallow arable land.

Examination of these statistics will show that by far the most important branch of agriculture, not only in Wales, but throughout the country, is stock-raising. The total area of Wales is 4,779,343 acres. Exclusive of fallow arable lands, there is in cultivation 2,847,751 acres, of which only

411,751 acres are devoted to grain-growing, while 2,316,241 acres are in meadow and pasture. The product of 78,871 acres of turnips, swedes, and mangolds is mostly fed to stock. This acreage should be added to that in hay and pasture to give approximately the total devoted exclusively to stock-raising. It will make the total acreage given up to this branch of agriculture about 2,395,112 acres, while only 452,639 acres are in grain, fruits, vegetables, etc., 35,024 being in potatoes.

Total area and area in cultivation in 1892 and 1893 in the United Kingdom.

Divisions.	Total area.	Under cultivation.*	
		1893.	1892.
	Acres.	*Acres.*	*Acres.*
England	32,509,322	24,897,562	24,924,204
Wales	4,779,343	2,855,972	2,859,803
Scotland	19,453,843	4,890,175	4,901,543
Ireland	20,706,258	15,208,414	15,162,521
Total	77,448,766	47,852,123	47,848,071

* Including fallow arable land.

This total area, taken from the total in the former table, which includes the Isle of Man and Channel Islands, leaves the area of the latter 193,333 acres. A similar comparison of the two tables shows there are in cultivation on the islands 127,375 acres. No statistics are at hand giving the number of acres devoted to each of the various branches of agriculture on the islands.

That stock-raising throughout the United Kingdom, as in Wales, is the leading agricultural industry is shown by the following table, compiled from the same returns as above:

Divisions.	In cultivation.*	Meadow, pasture, and roots for stock.	All other uses.
	Acres.	*Acres.*	*Acres.*
England	24,399,135	17,566,285	6,832,850
Wales	2,847,751	2,395,112	452,639
Scotland	4,882,265	3,423,044	1,459,221
Ireland	15,186,376	12,825,857	2,360,519
Total	47,315,527	36,210,298	11,105,229

* Exclusive of fallow arable land.

The cultivated area, including fallow lands, in the United Kingdom and islands for 1893 is 1,795 acres greater than in 1892, while the area of fallow lands has increased 52,474 acres. The area in grain crops has decreased 157,521 acres in the same time, and that in green crops 4,360 acres, while that in hay and pasture has increased 109,947 acres. Hops are not grown in the United Kingdom, except in England. The area in hops for 1893 is 1,306 acres greater than in 1892. Very little fruit is grown in Wales. It consists principally of apples and pears of an inferior quality and berries of various kinds and of fair quality grown in the open and very sheltered places. Peach and apricot trees trained against high stone walls facing the south produce some good fruit. But peaches are seldom grown except under glass, and grapes never. The same is true of the United Kingdom, except as to some favored localities in the south and east of England, where apples and pears are produced in greater abundance.

The United Kingdom, Wales especially, is noted for excellent mutton. Probably no other agricultural industry receives greater or more intelligent attention. In round numbers, England has 16,000,000 sheep to 24,000,000 acres under cultivation. Wales has over 3,000,000 sheep and fewer acres in cultivation. Scotland has over 7,000,000 sheep and less than 5,000,000 acres cultivated, while Ireland has only about 4,500,000 sheep to 15,000,000 acres in cultivation. In June, 1892, there were in the United Kingdom 10,777,655 sheep under one year old and 10,240,595 in June, 1893. From these figures it appears that the average annual product is over 10,000,000.

Agriculture is much depressed throughout the country. The principal causes are said to be a series of unfavorable seasons and the low prices of farm products.

CHARLES M. HOLTON,
Commercial Agent.

SWANSEA, *December 6, 1893.*

STOCK-EXCHANGE REGISTRY IN GERMANY.

The stock-exchange commission of Germany has, after careful study, decided to recommend the keeping of a registry, not only of members of the stock exchange, but of all persons doing business in futures. The object of this registry is to limit speculation as far as possible to professional brokers and to make it difficult for outsiders to gamble in stocks. Everyone doing business in futures is obliged to be inscribed in the stock-exchange registry, which is published from time to time in the Reichsanzeiger and certain specially prescribed local papers.

No person will be able to bring suit on any time transaction unless both the parties thereto are entered in the registry of the stock exchange nearest to their respective domiciles. Such transactions are not only invalid, but they are void in so far that persons can up to a certain time demand the return of their money lost through speculation.

Anyone not excluded from the leading German exchanges on account of questionable business can inscribe himself in the registry of the stock exchange. It is probable, however, that persons not doing a regular business on the exchange will hesitate before they run the risk of injuring their credit by putting their names on this register.

It is hoped that by these means a clearly defined line will at last be drawn between the regular business men of the exchange and the private individuals wishing to speculate.

If the results anticipated are produced, the commission expects that the example of Germany will be followed by other nations and that various international reforms will be attempted.

In Austria a registry is kept of all persons engaged in business on the exchange, but this is not made public, and considerable interest is felt in the experiment in Germany.

Especially is the matter of vital interest to the stockbrokers, who see therein, if not total extinction, yet great curtailment of their hitherto very profitable business.

MAX JUDD,
Consul-General.

VIENNA, *December 8, 1893.*

OBJECTIONABLE COTTON BALING.

The following is a copy of a circular framed December 15, 1893, at a conference of import brokers and agents held in this city for the purpose of protesting against the evil of which they complain:

> A number of American shippers, without giving any previous notice, have this season deviated from what has been customary for many years by increasing the packing of the bales by additions of canvas varying in amount from 3 to 8 pounds a bale.
>
> In many cases pieces of canvas extending over the entire length of the bale on both its surfaces have been added, frequently in double thickness, thus producing a double and even treble fold of canvas.
>
> This practice, in the absence of all preliminary warning, has come upon the importers as a complete surprise, and they feel bound to protest energetically against it and to render shippers responsible for any loss caused thereby.
>
> As regards shipments to Havre, this innovation has the most serious consequences, for the rules of the Havre market are stringent and strictly enforced, that all overcharge of tare and double canvas must be removed or deducted from the gross weight.
>
> The practice of increasing the tare not being general, confining itself, it appears, to cotton shipped from the interior, and notably from the interior of Texas, we can not but point out how shortsighted a policy it is to resort to this new practice, for it is evident that the cost of cotton being thereby increased to the buyer by 0$\frac{1}{32}$*d.* to 0$\frac{1}{16}$*d.* he will hold the shipper responsible, and only accept future business from the same shipper at that difference.
>
> It is futile to think that importers will buy in future without ascertaining first whether they are buying on old customary conditions or on new ones.
>
> The plea put forward by these shippers, in answer to remonstrance by cable, that the increased tare does not exceed 6 per cent, goes for nothing, for the new method is evidently a violation of what has been customary for many years and can not alter the existing Havre conditions, which will be enforced when the cotton is resold.
>
> Such innovations evidently can only be sanctioned by an agreement of the entire trade to that effect, and not by one-sided action on the part of the sellers.
>
> It is obvious, moreover, that two different systems of packing can not coexist without leading to continual disputes and difficulties, and that those sellers who adhere to the old and customary packing will have the advantage in selling their cotton.
>
> We therefore repeat that we can not recognize this departure from what was consecrated by custom, protest against it, and must hold the shippers responsible for any loss arising herefrom.

A committee of the Cotton Exchange of Havre waited on me to-day to present the circular and to express the hope that our Government would at least sympathize with its object. The signers of the circular are men of character and standing, and I have assured the committee that the Government could not be indifferent to such a move, though it might not be able to take any decided steps toward abating the evil beyond giving publicity to the matter.

C. W. CHANCELLOR,
Consul.

HAVRE, *December 28, 1893.*

NOTES.

Erratum in "American Flour in Germany."—In No. 159, page 419, sixth line, read $1.25 instead of 25 cents.

International Congress of Applied Chemistry.—The Department has been informed that there will be held in Belgium next August, in connection with the Universal Exposition of Antwerp, an international congress of applied chemistry. The Government of the United States has been requested to send official delegates to this congress.

Venezuelan Tariff Change.—Under date of November 8, 1893, Consul Plumacher, of Maracaibo, advises the Department of a modification of the tariff law of Venezuela by which "oilcloth roofing" is placed in the same category as "flooring of the same material." In the Venezuelan tariff, as issued by the Bureau of the American Republics, the duty on "oilcloths for floors or for wrapping" is given at 4.9 cents per pound.

Taxes and Duties in Salvador.—Under date of November 7, 1893, Vice-Consul Dawson, of San Salvador, reports that the law levying a tax of $2 per thousand on all urban property in Salvador valued at over $10,000 goes into effect in April, 1894. He further reports that by a recent decree 30 per cent of all import duties must be paid in gold, instead of 15 per cent, as decreed in June last. [This was to go into effect on February 1, 1894.]

Italian Savings Deposits.—Under date of November 14, 1893, Consul-General Jones, of Rome, transmits the following statistics:

Official figures for the first nine months of 1893 show that the deposits with the postal savings banks amounted to $41,685,840, an increase of $5,000,000 over the preceding year. Taking into calculation the sums withdrawn, we find that up to September 30 the deposits with the postal savings banks reached the sum of $78,310,563, an increase over the preceding year at the same date of $7,400,000.

The situation of the savings banks other than postal savings banks June 30, 1893, showed the deposits to have reached the sum of $47,194,373, exceeding the amount withdrawn by $6,250,000. On June 30 the total deposits with the savings banks other than postal savings banks amounted to $256,310,000.

Postal savings banks pay 3½ per cent interest; savings banks other than postal pay 4 per cent. But the government collects a tax on deposits with these last-mentioned savings banks.

British-Venezuelan Commercial Relations.—Under date of November 14, 1893, Consul Pierce, of Trinidad, reports details relative to the establishment of a commercial bank in Caracas by English capitalists, which would seem to be a forerunner of better commercial relations between Great Britain and Venezuela. He adds that the suspended diplomatic relations between the countries have handicapped the trade of Trinidad—a natural entrepôt for the trade of the Orinoco country—by an extra ad valorem duty of 30 per cent levied on the products of the island entering Venezuelan ports.

Duties in Venezuela.—Under dates of December 4 and 7, 1893, Consul Plumacher transmits to the Department information concerning duties on stockings and on wine from Portugal. The decree relative to the former provides that stockings of twisted cotton, known in the trade as "stockings of Scotch thread," shall be scheduled in the seventh tariff class—$1 per kilogram. By resolution of the Minister of Finance the Government has decided that wine of Oporto, when imported in demijohns or in bottles, shall be scheduled in the fourth tariff class—15 cents per kilogram—even though it be claret.

Free Goods in Venezuela.—Under date of November 15, 1893, Consul Plumacher, of Maracaibo, transmits a resolution of the Ministry of Finance relative to the admission of articles which are to be free from duties by virtue of contracts celebrated with enterprises of improvements or public works or for other reasons in favor of corporations or individuals. Such articles must be accompanied, for their dispatch through the custom-houses, by special certified invoices, which shall not contain any other articles subject to the payment of duties, proving the exemption in each case by the respective order from the Ministry; and if, for any reason, the articles fail to arrive with the separate invoices established by said resolution, duties will be recovered according to the tariff.

Custom-house and Warehouses in Maracaibo.—Under date of November 10, 1893, Consul Plumacher transmits to the Department a copy of a recent contract between the Venezuelan Government and the merchants of Maracaibo for the filling in of a large part of the lake and the construction, upon the ground thus made, of extensive wharves and custom-house buildings. When these improvements are completed, vessels of all classes will be able to lie alongside the wharves, instead of anchoring in the stream as at present, the expense and delay incident to lighterage will be avoided, and in many other ways the benefits conferred upon the public will be great. As the necessary capital is already paid up, the entire mercantile body being interested in the scheme, there is no doubt of its speedy realization.

Mail Transmission in Vienna.—In reply to inquiries from the United States, Consul-General Max Judd, of Vienna, transmits the following information:

The tubular, or conduit, system is used quite extensively in Vienna for the transmission of mails, and, in spite of the increased use of the telephone, the tubular system is being constantly extended. There are at present 40 kilometers (about 25 miles) of pipes, which draw their power from four machine houses, two of which have a 25-horse power and two a 15-horse power. The pipes are made of cast iron.

The telephone is of great service to the offices which are fortunate enough to be connected with the general system, but these are greatly in the minority, as there are only twenty-five offices having such connection. The telegraph is made use of only in matters of great importance.

Italian Sulphur Output.—Under date of November, 1893, Consul-General Jones, of Rome, transmits the following statistics taken from official sources:

The total production of brimstone in 1892 was 418,555 tons, an increase of 23,027 tons over the output for 1891. This increase is almost entirely due to the greater production of the Sicilian mines, which more than made up for the falling off at the mines in the districts of Bologna and Avellino. There was a small increase—400 tons—from the Calabrian mines. The average price of brimstone having fallen from $23.16 to $19.27 per ton, the value of the total output in 1892 was $8,070,260—$109,135 less than the value of that produced in 1891. The Sicilian mines employed 33,171 hands, or 902 more than in 1891; and 2,672,532 tons of mineral were treated, with a yield of 14.007 per cent of brimstone. The average price in 1892 of the several qualities of brimstone delivered at the ports, free on board, was $19.57, or $4.20 per ton less than in 1891.

Furniture and Carriage Leather.—Under date of November 23, 1893, in answer to inquiries from the United States, Consul-General Max Judd, of Vienna, writes:

The railroad companies in Austria, all of which build their own cars, use leather exclusively for the covering of the second-class coaches; but 110,000 florins will cover their total annual expenditure for this purpose.

At the present time the so-called buffalo leather, split and dried, has taken the place of goat leather, which used to be employed for this purpose some years ago.

Goat leather is used very extensively at present in the upholstering of carriages. Good judges state that 750,000 florins will cover the amount expended annually for leather for carriages.

It is difficult to get at the amount of leather used for the covering of furniture, but it is known to be very large.

Most of the leather used in Austria is produced at home. Vienna has a reputation for excellent calfskins suitable for boots and shoes, but in my opinion the calfskin used for shoes for men is decidedly inferior to the best leather used for this purpose in the United States. The next largest supply comes from India, the third from South America; only very little is brought from the United States. The patent leather used here is mainly brought from Frankfort and Mayence, where very large leather manufactories are established.

The principal leather dealers in Vienna are Leop. Ulrich Sonne, Gustav Friedrich, Jacob Bradl, Gerhardus Sonne, J. H. Gewitch, and Hassek & Hufman.

Singapore Black Pepper.—Under date of November 7, 1893, Mr. E. Spencer Pratt, consul-general at Singapore, reports:

The present low price of Singapore black pepper—say $9.50 per picul of 133⅓ pounds—has been brought about by overproduction. The acreage planted until within the last two years had increased to such an extent that the supply exceeded the demand, and even at the low rates now ruling there is no briskness in the trade.

At $9.50 to $10 per picul the cost of production is about covered, that is, by the Chinese system of cultivation.

The next year's crop is estimated to turn out less than the present one, but not to such a degree as to materially affect values, which would depend more upon the demand for the article in Europe and America. By July, 1895, however, the production is expected to be reduced quite 30 to 40 per cent under what it is now.

Haitian Teas, Starch, and Pepper.—Under date of Port-au-Prince, December 9, 1893, Consul-General Smythe transmits certain samples described in the following dispatch:

I transmit herewith samples of native teas which have been collected with great care by Mr. Richard Allen, and which I hope will be turned over to the proper department for classification and examination. With the teas I also send specimens of the starch extensively made by the people from an edible tuber known as the manioc, which is also used in another form for bread. I also transmit "piment oiseau," or native "bird pepper," which must be the cayenne pepper of commerce, as well as the active element of capsicum. The following are the samples:

Teas.—(1) Petit balai; (2) anie (anisette); (3) malaquette; (4) charpentier (carpenters' grass); (5) bonbonier; (6) saisie (sedative, used in cases of sudden shocks, fright, etc.); (7) citronella (citron grass); (8) basilique; (9) melisse (used for indigestion, nervous prostration, etc.); (10) boisdivie [?].

(11) Starch (Amidon) prepared from manioc.

(12) Piment oiseau (bird pepper).

[Samples sent to the Department of Agriculture].

Nova Scotia Coal.—Consul-Ceneral Ingraham sends, under date of January 6, 1894, the following extract from the address of the lieutenant-governor at the opening of the legislature of Nova Scotia:

In one of the most important departments of industry—that of coal-mining—there has been very gratifying activity. The output of coal from the mines of Nova Scotia in 1893 exceeded that of any previous year in our history, and the prospects for further extension of mining enterprise are of the most encouraging character.

You will be glad to know that the progress already made by the new company under the special act of last session for the further encouragement of coal-mining has fully realized the expectations of the promoters of that measure. The mines operated by the company have produced a larger quantity of coal than in previous years. The preparations of the company for future work, including the construction of the new railway to Louisburg, one section of which is already open, give promise of a large development of our coal trade.

These extensive operations in coal-mining have not only promoted industrial and commercial activity, but, through the increased royalty, have added largely to the provincial revenue, and have placed the provincial finances in a more satisfactory position than for some years past.

With a view to still further encouraging coal-mining operations, my government has entered into a contract with another company for the construction of a railway from Orangedale to Broad Cove, in the county of Inverness, in connection with a project for the development of the valuable coal fields of that section.

The question of railway extension to the counties of Queens and Shelburne, which have hitherto been without railway facilities, has occupied the attention of my government during the recess, and, although formal contracts have not yet been entered into, such assurances of aid have been given to projected lines as will, it is believed, secure their construction at an early day.

Dundee Seal and Whaling Fleet.—Under date of December 1, 1893, Consul Savage transmits the following statistics concerning the Dundee seal and whaling fleet:

Four vessels were engaged in whale and three in seal fishing. The number of whales caught during the past season was largely in excess of those caught in any recent year, and this notwithstanding that all of the ships were more or less hindered by fogs. The seal fishing was, however, the most unprofitable of any year for a long time. The result will be seen by the following figures:

Davis Strait.—Whales caught, 29; bone secured, 19½ tons; oil, 381 tons.

Newfoundland.—Seals caught, 16,950; oil secured, 255 tons.

The prices current for seal and whale oil and whalebone are as follows per ton:

Description.	1893.	1892.
Seal oil in casks, brown and pale	£20 to £22	£22 to £24
Whale oil in casks	22 to 23	23 to 24
Whalebone	1,500	2,600

There is no definite price fixed for whalebone this year, but the above is what it is expected to realize.

Petroleum in Lower Alsace.—From a note presented by M. Daubrée at a recent meeting of the Academy of Sciences, at Paris, it appears that the petroleum deposits which were discovered ten or twelve years ago in the neighborhood of Pechelbronn, in Lower Alsace, have been worked with such success that they now produce about 160,000 pounds of crude oil per day. This petroleum is found in the Tertiary formation which prevails in that region; it first indicated its presence by flowing from springs of water and by occasional escaping jets of inflammable gas. The first borings did not exceed 500 feet in depth, and revealed a more or less abundant supply of petroleum and carbonated gases. Since then wells have been pierced to a depth of 2,034 feet, where the extraordinary temperature of 141° F. was observed, and even at 1,000 feet the thermometer registered 133° F. The exact area of the deposit is not yet accurately known, but the fact that, after ten years of working in a country where both crude and refined petroleum bear a heavy import duty and are therefore costly to consumers, the daily product of the entire region has not been pushed beyond 80 tons would indicate that American petroleum has but little to fear from this new source of competition.—FRANK H. MASON, *Consul-General at Frankfort.*

Mexican Exports.—Consul Schaefer, at Veracruz, under date of December 19, 1893, submits the following table taken from the Mexican Trader of December 14, 1893:

MEXICAN EXPORTS.

The following table shows the destination, etc., of Mexican exports during the fiscal years 1882–'83 and 1891–'92:

Destination.	1882–'83.		1891–'92.		Average of 10 years.	
	Value.	Ratio.	Value.	Ratio.	Value.	Ratio.
		Per cent.		*Per cent.*		*Per cent.*
Germany	$1,125,719.21	2.69	$4.344,231.60	5.76	$2,057,431.80	3.82
Spain	1,899,258.74	4.74	661,849.86	0.89	861,575.20	1.61
United States	16,739,097.70	40.04	49,928,664.88	66.17	32,742,605.00	60.82
France	4,204,905.55	10.07	4,644,385.51	6.12	3,779,911.70	7.02
England	17,258,242.61	41.29	15,267,955.68	20.24	13,986,723.58	25.98
Other countries	490,371.54	1.17	620,627.42	0.82	404,894.17	0.75
Total	41,807,595.35	100	75,467,714.95	100	53,833,141.45	100

An inspection of the above table can not but draw attention to the increase in the exports during the last ten years to Germany, but principally to the United States, as well as to the loss of trade with Spain, France, and other nations, but principally England.

Consular Reports Transmitted to Other Departments.—The following reports were referred during the months of December and January to other departments for publication or for proper action thereon:

Consular officer reporting.	Date.	Subject.	Department to which referred.
Joseph A. Springer, Habana	Nov. 23, 1893	Hours of labor, etc., of Government employés.	Civil Service Commission.*
P. F. Hyatt, Santiago de Cuba	Nov. 24, 1893	Sugar yield of Cuba	Department of Agriculture.
E. Schneegans, Saigon	Oct. 7, 1893	Rice market	Do.
J. C. Monaghan, Chemnitz	Nov. 14, 1893	Tuberculosis in cattle in Saxony.	Do.
Julius Muth, Magdeburg	Nov. 22, 1893	Market prices, food articles	Treasury Department (Bureau of Statistics).
Geo. H. Murphy, Luxemburg	Nov. 24, 1893	Translation of fishery treaty pending before Luxemburg Chamber of Deputies and of treaty of June 30, 1885, between Prussia, Holland, and Switzerland relating to fishing in the Rhine.	Commissioner of Fish and Fisheries.
J. C. Monaghan, Chemnitz	Nov. 20, 1893	Feeding cattle	Department of Agriculture.
Henry M. Smythe, Port-au-Prince.	Dec. 23, 1893	Haitian teas, starch, and pepper (12 samples).	Do.
J. C. Monaghan, Chemnitz	Nov. 20, 1893	Fertilizers for fruit trees	Do.
Van Leer Polk, Bombay	Dec. 20, 1893	Notes on cultivation of cotton in Bombay.	Do.

*All reports received from consular officers on this subject have been similarly referred for publication by the Civil Service Commission.

EXTENSION OF MARKETS

FOR

AMERICAN FLOUR.

CIRCULAR.

On December 5, 1893, the following circular was addressed by the Department to all consular officers of the United States:

You are hereby requested to prepare for publication reports upon "The Extension of Markets for American Wheat Flour."

The following interrogatories cover the principal points upon which information is desired:

(1) What is the standard of living in your district? Are the people ready to eat American flour?

(2) What quality of flour is most used?

(3) What quantity of American wheat flour was imported into your district in the year ending June 30, 1891?

(4) What quantity in the year ending June 30, 1892?

(5) What quantity in the year ending June 30, 1893?

(6) What quantity of American wheat each year during the same period?

(7) What quantity of wheat flour from other countries during the same period?

(8) What quantity of wheat from other countries during the same period?

(9) What is the import duty on American wheat flour?

(10) What is the import duty on American wheat?

(11) What is the import duty on wheat flour from other countries?

(12) What is the import duty on wheat from other countries?

(13) What are the facilities for monetary exchange?

(14) What are the facilities for shipping from the United States to your port?

(15) If there are any obstacles in the way of the extension of trade in American flour, what are they?

(16) What, in your opinion, are the prospects for doing a more extensive business in American flour in the country in which you represent the United States?

In answer to questions 3, 4, 5, 6, 7, and 8 consular officers at seaports will furnish official statistics, others will furnish estimates.

Questions 9, 10, 11, and 12 are to be answered only by the consul-general in each country.

CANADA.*

MANITOBA.

STANDARD OF LIVING.

The standard of living here is high. The higher grades of Hungarian-process flour are extensively used, and are easily had from local manufacturers, being obtained from a plentiful supply of spring wheat raised in this province and in the Northwest Territories.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are excellent. There are ten chartered and two private banks doing business in this city (Winnipeg); besides, there are within this consulate chartered banks doing a regular business at Port Arthur, Fort William, Rat Portage, Keewatin, Portage la Prairie, Brandon, Regina, Calgary, Lethbridge, and Prince Albert. There are two competing railroad lines to this port from St. Paul and Minneapolis, both of which have terminal points at Duluth.

AMERICAN FLOUR AND WHEAT.

American flour is barred from this market by an import duty of 75 cents per barrel. Besides, the freight rates from American points make competition with local mills difficult, if not impossible. Good wheat can be had close at hand in abundance at first cost direct from the farmer. With a full interchange of flour between the United States and the territory embraced within this consulate, our American millers might at times sell here, but they could not secure a steady, profitable market.

This is a wheat-growing country, and large quantities are annually raised for home consumption and for export.

M. M. DUFFIE,
Consul.

WINNIPEG, *January 9, 1894.*

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*To be followed in subsequent numbers of this journal by reports from other countries as they are received.

NEW BRUNSWICK.*

ST. JOHN.

STANDARD OF LIVING.

The province of New Brunswick, of which St. John is the principal port of importation, is at present practically cut off from the American markets of cereal products by the operation of the Dominion tariff and the discriminating freights in favor of Canadian products.

The standard of living in this province is not dissimilar to that of the neighboring State of Maine, and doubtless its people would be equally ready to use American flour if prices would permit.

QUALITY OF FLOUR CONSUMED.

The flour used here is largely the product of Manitoba "hard wheat," very similar in grade to the corresponding article manufactured from Minnesota grain; and I am informed by both dealers and consumers that little, if any, difference exists in the quality of the respective flours.

AMERICAN FLOUR AND WHEAT.

The importation of wheat flour from the United States for the past three years ending June 30 has been as follows: 1891, 1,193 barrels; 1892, 818 barrels; 1893, 309 barrels.

During those periods not a bushel of American wheat was entered at this port, and no wheat or wheat flour was imported from any other country.

EXCHANGE AND SHIPPING FACILITIES.

The close relations between this port and the money centers of the United States offer the best of facilities for exchange, and the shipping facilities of St. John are excellent, both by rail and water. The great obstacle in the way of trade in American flour is the high duty placed by the Dominion Government upon it, and as long as that duty remains there is little hope for more extended business in this direction.

The best grade of Manitoba flour retails here at $4.20 per barrel, about the sum at which a similar article of American production is quoted in the markets of Portland, Me.

A large number of vessels entering this port are engaged in the lumber trade and arrive at St. John in ballast from various ports of the United States. By utilizing this means of carriage American flour could doubtless be placed in these markets in favorable competition with Dominion products were it not that the duty of 75 cents per barrel is practically prohibitory.

The nearness of this port to those of the United States and the facilities for transportation by water ought naturally to render the charges for carriage of American flour less than the freight rates by rail from Manitoba; and I am informed that, in recognition of this fact, a discriminating rebate is allowed for the cereal products of the Dominion by those railroads that are operated by the Government.

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*An answer to the circular was also received from the consulate at Moncton.

While the commercial policies of the two countries remain unchanged there can be little hope for extension of business in the articles in question.

JOHN S. DERBY,
Consul.

ST. JOHN, *December 21, 1893.*

ST. STEPHEN.

STANDARD OF LIVING.

The standard of living in this district is high. The people have no objection to American flour, yet are well satisfied with that produced in their own country.

QUALITY OF FLOUR CONSUMED.

The qualities of flour most used are, as compared with flour of the highest grade and best quality, the 80 and 90 per cent grades.

AMERICAN FLOUR AND WHEAT.

The importations of American wheat flour into this district during the years ending June 30, 1891, 1892, and 1893, were as follows:

Year.	Barrels.	Value.
1891	244	$1,459
1892	127	763
1893	80	478

During the same period no American wheat was imported into this district, nor were there any importations of wheat flour from other countries.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange at this port are excellent. Drafts upon various points in the United States can be procured at reasonable rates of exchange. Such facilities are lacking in other parts of the district.

The facilities for shipping from the United States are of the best kind, either by railway to points in various parts of the district or by steamers and sailing vessels to the seaports.

OBSTACLES TO TRADE.

There are several obstacles in the way of the extension of trade in American flour in this district.

Canadian flour is of good quality. The claim is made that it is even better than American flour. It is sold at a low price. The 90 per cent grade can be purchased, delivered, for $3.35. Recently a large lot was offered for $3.25. The best Manitoba patent flours, manufactured from hard wheat and claimed to be equal to the finest Minnesota brands, are retailed for $5 per barrel.

Shipping facilities are superior. The Canadian Pacific Railway furnishes direct connection with the principal points in Canada where flour is manufactured, and the rates for freight are reasonably low.

The last obstacle to be mentioned is the duty of 75 cents per barrel on imported flour, which, at ruling prices, would seem to be sufficient to prevent Americans from entering into competition with Canadian manufacturers.

TRADE OUTLOOK.

Under existing conditions, I am of the opinion, and the consular agents concur with me, that there is no prospect of doing a more extensive business in American flour in this country.

EDGAR WHIDDEN,
Consul.

St. STEPHEN, *December 26, 1893.*

NOVA SCOTIA.*

HALIFAX.

The quantity of flour used here is small, but of the best quality. The standard of living is about the same as in New England. The question of readiness to use our flour is only one of price.

As facilities for exchange on Boston and New York are easy, and shipping facilities also excellent by coasters, steamers, and rail, I see no obstacle in the way of increasing importations of those articles except the duties.

The following is an official statement prepared by Mr. Thomas Cardwell, statistical clerk in the custom-house at this port, of the importation of American wheat flour and wheat into Halifax for 1891, 1892, and 1893:

Year ending June 30—	Wheat flour.		Wheat.	
	Quantity.	Value.	Quantity.	Value.
	Barrels.		*Bushels.*	
1891	625	$2,729	20	$34
1892	2,948½	13,242	40	52
1893	14	58	10	13

DARIUS H. INGRAHAM,
Consul-General.

HALIFAX, *January 8, 1894.*

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* Answers to the circular were also received from the consulate at Yarmouth and from the agencies at Liverpool and Lunenburg.

NORTHERN NOVA SCOTIA.

STANDARD OF LIVING.

The standard of living in this consular district—northern Nova Scotia and Cape Breton—compares favorably with that in as sparsely settled parts of New England; and the people are ready, I think, to use American flour; or, to give the answer of the United States consular agent at Cape Canso, "The people are ready to eat American flour when they can purchase it as low as Canadian flour." To this question the consular agent at Sydney, Cape Breton, a large mining district, answers simply, "Yes." The reply of the consular agent at Port Hawksbury and Mulgrave, on the Strait of Canso, is: "Under the present import duty they are not."

The whole question as to the people of this district consuming American flour seems to be summed up in the reply of the agent at Cape Canso: "They will eat it when they can buy it as cheaply as they can buy Canadian flour." I will add that they will buy a great deal of it when they can get it a little cheaper than the Canadian article.

QUALITY OF FLOUR CONSUMED.

The quality of flour most used is of the best, although there are also cheap grades sold. The poorer classes here, like those in the United States, appear to want to use the best white flour they can get. On this point the consular agent at Sydney writes that "as to quality of flour, even our mining classes require the highest grades;" and the same can be said of the miners in the county of Pictou, who comprise a considerable part of the consuming class.

AMERICAN FLOUR AND WHEAT.

The quantity of American wheat flour imported into this district in the year ending June 30, 1891, was 68 barrels, 52 of which were entered in the Pictou customs district and 16 in that of Arichat, Cape Breton. The number of barrels imported in the year ending June 30, 1892, was 6, entered at Arichat. The same for 1893 was 4 barrels, also entered at Arichat.

There was no American wheat imported into the district during the years above mentioned, nor were there for the same period any importations of wheat flour from other countries.

The quantity of wheat imported from other countries during this period was 2 bushels, and this was brought here for seed. Comparatively little wheat is grown in this consular district. Consular Agent Burchell, of Sydney, Cape Breton, in speaking of this, says: "No wheat is grown here." This is probably true of nearly all Cape Breton Island and, indeed, of most parts of the entire district.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are good, chiefly through chartered banks.

The facilities for shipping from the United States to this port are in winter by rail only, in summer, by rail and steamer, the latter running to Boston. In great part the facilities for transportation to and from the United States are about the same for the rest of the district. Ports like Cape Canso and Arichat (to which the railroad does not extend), Port Hawksbury, Mulgrave, and Sydney all have weekly steamboat connections with Boston in summer, and often freight comes to those ports from the United States in sailing vessels. Rates on flour from Boston to the Strait of Canso by vessel and boat range from 12 to 16 cents per barrel. Vessels take stone from Wallace and vicinity to the United States and return light. The agent at Pugwash and Wallace says that these vessels would be good freighters and that their managers would be glad to have them bring back American freight instead of returning empty.

OBSTACLES TO TRADE.

To the question, what, if any, obstacles stand in the way of the extension of trade in American flour, the consular agents in this district (all Canadians and all in trade, except one, a banker) unanimously reply: "The Canadian duty." That is, they consider that with the duty removed American flour would be sold as cheaply as, or more cheaply than, Canadian flour. My opinion is that there will be a good market for American flour in this district, especially around Cape Breton and the Strait of Canso, whenever it is sold a shade lower than the home, or Dominion, product. Undoubtedly a considerable amount of our flour would be sold even at the same price as the home article.

There is a great amount of fish sent to the United States from here, which, with prices favorable, would be largely exchanged for our flour, for, as Consular Agent Bain, of Port Hawksbury and Mulgrave, points out, speaking as a provincial and with the import duty as canceled, "our natural exchange for fish would be largely flour."

M. P. PENDLETON,
Consul.

PICTOU, *December 26, 1893.*

ONTARIO.*

BELLEVILLE.

STANDARD OF LIVING.

The standard of living of the people in this district is very similar to that of the same classes in New York State. The people would be perfectly willing to use American flour if it could be procured at the same prices as, or at lower prices than, those charged for the same grades obtained from Canadian wheat.

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*Answers to the circular were also received from the consuls at Amherstburg, Brockville, Fort Erie, Guelph, Port Rowan, and Trenton. No American flour is consumed in these districts.

The flour used here consists of "Strong Baker's," made from Manitoba spring wheat, and "Family," made from domestic winter wheat, in proportions of two-thirds of the former to one-third of the latter.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are first class, as all of the large Canadian banks have branches scattered throughout this district.

The shipping facilities are excellent, as both the Grand Trunk and Canadian Pacific railways pass through this district from east to west, besides steam barges and schooners on Lake Ontario. There are good docks and warehouses at all the ports, with good facilities for loading and unloading vessels and storing the cargoes.

OBSTACLES TO TRADE.

The principal obstacle in the way of an extension of trade in American flour is the tariff. Previous to 1866 probably 50 to 60 per cent of the flour used here was of American manufacture, but the abrogation of the reciprocity treaty cut this trade off. The vessels would load with lumber or other Canadian products for Oswego or other American ports and return laden with American flour. Since that time, however, they have built larger and better mills with modern machinery, and we could hardly expect, under any circumstances, to furnish as large a percentage of the flour used as before. One miller—Mr. Charles Smith, of Campbellford, Ont.—has lately purchased two carloads of hard spring wheat in Chicago as an experiment. It cost him, laid down at his mill, about the same as Manitoba wheat (including the duty); but he says the result was unsatisfactory, as the flour was not of as good color as that made from Manitoba wheat, nor was it as strong a flour. The freight charges, however, were in favor of the American wheat, as I am told that the Canadian Pacific has a practical monopoly of the carrying trade of Manitoba, while on the American side the competition makes the cost of transportation cheaper.

TRADE OUTLOOK.

I do not think that under present conditions the outlook for extending the market for American flour is at all promising; but it is the opinion of a majority of the larger dealers that were the same conditions existing as in and previous to 1865 our trade in flour with this district would be to a large extent regained, and in this opinion I concur.

M. J. HENDRICK,
Consul.

BELLEVILLE, *December 26, 1893.*

CHATHAM.

No American wheat or flour can be sold here and pay the present duty imposed upon those articles, and none has been imported in years. All the flour used is made here from winter wheat grown in western Ontario, with the exception of a very small amount made from wheat brought from the Canadian northwest. Of the total amount sold, 75 per cent is made by the so-called "patent process."

The facilities for shipping here are of the best—either by one of three railroads or by steamer during the season of navigation. The removal of the duty would admit a certain quantity of spring wheat or flour made from it, as the bakers generally prefer it; but the leading men in the milling business claim that the abolition of the United States duty would admit them to a proportionate share of American trade. They sell their best flour now in carload lots at $2.75 per barrel. Local retailers buy at $3 and sell to consumers at $3.50.

EDWIN F. BISHOP,
Consul.

CHATHAM, *December 19, 1893.*

COLLINGWOOD.

STANDARD OF LIVING.

The standard of living in this consular district is good and very similar to that which prevails in New York, Ohio, Michigan, and other States bordering on the great lakes. The people are ready to consume American flour, provided it is of as good a quality and can compete in price with that obtained in the home market; but the cost, including the duty, prevents its coming into competition with the Canadian product.

QUALITY OF FLOUR CONSUMED.

The quality of flour most used in this district is known to the trade as "straight roller" and "patents."

AMERICAN FLOUR AND WHEAT.

No wheat or wheat flour was imported from the United States or elsewhere into this district during the years 1891, 1892, and 1893.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are excellent and about the same as in the United States.

The facilities for shipping from the United States are good, by both rail and water during the season of navigation, and by direct railroad communication with the United States the year around.

OBSTACLES TO TRADE.

The obstacles in the way of an extension of trade in American flour are the prevailing rate of duty here, the local production, which somewhat exceeds the consumption, and the wheat and flour which are brought here from Manitoba and the Canadian northwest.

There are no prospects for doing a more extensive business in American flour in this country so long as these conditions prevail.

JAMES C. QUIGGLE,
Commercial Agent.

COLLINGWOOD, *January 3, 1894.*

HAMILTON.

STANDARD OF LIVING.

The majority of the inhabitants of this district, which contains a population of 194,000, are prosperous farmers, whose standard of living is not inferior to that of any agricultural community of like number in New York or Pennsylvania. There are, moreover, eight manufacturing cities or towns in the district, each of which has a population of 1,500 or more—one of them has 7,500, one 13,000, and the largest 50,000 inhabitants. Among them is found a large number of skilled artisans, who are given regular employment at remunerative wages and who occupy comfortable dwellings and habitually consume food of good quality. The people of this district are quite ready to make use of United States flour, provided they can obtain it of grades equal or superior in quality to those of Canadian flour and at a somewhat lower price.

QUALITY OF FLOUR CONSUMED.

The first and second grades of spring-wheat flour, known as "Manitoba flour," are most used. Of this flour the bakers in making bread generally use a proportion of two-thirds with one-third of Ontario winter-wheat flour, but farmers and others who habitually bake their own bread employ a larger proportion of the latter.

AMERICAN FLOUR AND WHEAT.

In order to obtain the data to answer questions 3, 4, 5, 6, 7, and 8 of the circular, I have applied to the collector of customs at each of the five ports of entry in this consular district. The collector of customs at Hamilton has informed me that no wheat flour from the United States or from any other country was imported through his port of entry during the years ending June 30, 1891, and June 30, 1892, but that half a barrel of flour was imported from the United States during the year ending June 30, 1893, for the purpose of making certain special bread for the use of Hebrews in their religious observances. He has furthermore stated that one barrel of cracked wheat was imported from the United States specially, on private account, during the year ending June 30, 1891, and that 6 bushels of United States wheat were imported during that year and 25 bushels from the same country during the year ending June 30, 1893. These two lots of 6 bushels and of 25 bushels of wheat were imported, he believes, for use as seed. No wheat was imported from other countries through the port of Hamilton during the three years in question, nor was any foreign wheat flour or wheat imported during those years through the ports of entry of Berlin, Galt, Paris, or Brantford, Ontario, with the exception of 950 barrels of flour imported from the United States through the port of Brantford during the year ending June 30, 1893. It appears, upon investigation, that this importation consisted of a lot of damaged flour purchased at a very low price for the purpose of manufacturing starch therefrom, and that its damaged condition and the low price at which it was bought admitted of its importation at a comparatively small cost to the importer, notwithstanding the high rate of duty on flour.

EXCHANGE AND SHIPPING FACILITIES.

The facilities in this district for monetary exchange are excellent. There is in almost every town or city of Ontario containing 1,500 inhabitants or more a branch bank of one of the seven great banking institutions of Canada, of which the head office is located at Montreal, at Toronto, or at Hamilton, with the exception of the Bank of British North America, the head office of which is in London, England. These banking institutions are universally regarded as unusually strong, on account of careful management and strict supervision. The smallest of them has a paid-up capital of $1,200,000 and the four largest a paid-up capital of $6,000,000 each. All of the branches in Ontario of these great banks maintain correspondence and transact exchange business through their respective head offices with prominent banks and bankers in nearly all sections of the United States.

The facilities for shipping from the United States are very ample both by railroad and steamship. The Grand Trunk Railway, of which the principal branch runs from Port Huron, Mich., to Suspension Bridge, N. Y., has many lateral branches throughout this consular district, which greatly facilitate the distribution of merchandise from the western section of the United States, where the largest quantity of flour and the best quality thereof are produced. The Canadian Pacific Railway also affords transportation for merchandise from the northwestern States of the Union to the towns of Galt and Milton, in this district, where it crosses the Grand Trunk Railway and where such merchandise can be transshipped to the latter railway for distribution throughout this consular district. Goods can also be forwarded by steamship from ports on Lake Superior, Lake Michigan, or Lake Huron to Collingwood, Ontario, a port on the last-named lake, and thence by the Grand Trunk Railway to all parts of Ontario, or they may be sent by steamship through the lakes above mentioned and through Lake Erie and the Welland Canal to Hamilton, the chief and largest city in this district, for distribution.

OBSTACLES TO TRADE.

The great and only serious obstacle in the way of the extension of trade in American flour in this district is the customs duty imposed by the Dominion of 75 cents per barrel on flour and 15 cents per bushel on wheat.

TRADE OUTLOOK.

The wholesale price in this market for Manitoba flour made from spring wheat and commonly termed here "strong flour" is from $3.50 to $3.80 per barrel. The wholesale price for flour from winter wheat is $2.60 to $2.75 per barrel. This flour is made from Ontario wheat.

The latest quotations accessible here of the wholesale prices in the Chicago market are from $3.80 to $4.15 per barrel for flour from spring wheat and from $3.25 to $3.50 per barrel for flour from winter wheat. It will be observed that the above quotations indicate that the price of each of the two grades of flour in question is somewhat less at present in this consular district than at Chicago, but millers and consumers of flour here allege that the Manitoba spring-wheat flour is equal in all respects to that of Minnesota, and that the flour from Ontario winter wheat is as good as the American wheat flour. Furthermore, the payment of the duty imposed on American flour imported into Canada would add 75 cents per barrel to the price of the flour as quoted at Chicago when the same is received by an importer in Ontario. Under these circumstances it would seem that "the prospects for doing a more extensive business in American flour" in this section are not good.

C. F. MACDONALD,
Consul.

HAMILTON, *January 11, 1894.*

KINGSTON.

The standard of living in this district is high, and the quality of flour used is good.

From June 30, 1891, to the present time only one carload of American flour has been imported into this district; with that single exception, all flour used since that date has been from Canadian wheat ground in Canadian mills.

Facilities for monetary exchange and shipping are superior.

During this season the average transportation rate on grain from Port Arthur, Manitoba, has been but eight-tenths of a cent more than the rates from. Duluth or Chicago. Against this difference is the price of wheat in favor of the Canadian product and the tariff of 15 cents per bushel on wheat and 75 cents per barrel on flour.

The people are ready to eat American flour if it can be given to them better or cheaper than the Canadian article.

Under present circumstances the outlook for placing American flour upon this market is not favorable.

M. H. TWITCHELL,
Consul.

KINGSTON, *December 20, 1893.*

OTTAWA.

The standard of living in Canada is practically the same as in the United States, and the same quality of flour is used.

Canada is essentially a wheat producing and exporting country, and the importations of American wheat and wheat flour are only nominal. During the fiscal year ending June 30, 1892, the last for which official figures are in print, Canada imported 66,113 bushels of wheat, of which 66,105 bushels came from the United States, and 36,559 barrels of wheat flour, of which 34,338 barrels came from the United States. During the same year Canada exported 8,714,154 bushels of domestic wheat, of which 1,489,881 bushels were sent to the United States, and 380,996 barrels of domestic wheat flour, of which 3,998 were for the United States.

The facilities for monetary exchange and for shipping are practically the same as in the United States.

The obstacles in the way of extending the trade in American wheat and flour in Canada are mainly twofold—the import duty and the fact that Canada can and does produce these products quite as cheaply as the United States. For these reasons, and especially the latter, the use of American wheat flour can only be local and occasional.

JOHN B. RILEY,
Consul-General.

OTTAWA, *December 28, 1893.*

PORT SARNIA.

This is an agricultural district. They export from here large quantities of wheat to the United States, so it would be difficult to extend the market for American wheat flour here. There was no American wheat flour imported into this district in the years ending June 30, 1891, 1892, or 1893, and no American wheat during the same period. There was none from other countries during the above years.

The facilities for monetary exchange are good, and the facilities for shipping from the United States to this port are also good.

The greatest obstacle in the way of the extension of trade in American flour is the duty.

ARTHUR M. CLARK,
Consul.

PORT SARNIA, *January 8, 1894.*

WINDSOR.

The standard of living in this province is identical with that of the same classes in the United States. The people do not need to buy American wheat or American wheat flour, for they raise a surplus which is exported; yet Manitoba finds a market here for its grain, by special rates with the Canadian Pacific Railway, and that grade of flour is now sold in this market at $3.25 (retail) for A No. 1, which is equal to our best Minnesota (or said to be).

All grades are used, but choice spring is most in favor.

Money exchanges are freely made at rates current in the United States.

Facilities for shipping are unsurpassed, both by water and rail, in every direction.

The only obstacles in the way of extending the trade is the tariff.

MARSHALL P. THATCHER,
Consul.

WINDSOR, *December 26, 1893.*

QUEBEC.*

MONTREAL.

STANDARD OF LIVING.

Wheat flour is generally used, and in the country districts its use is probably more universal than even in the United States, there being very little bread made from flour or meal of other cereals.

QUALITY OF FLOUR CONSUMED.

The quality of flour which seems to be in greatest demand is stated to be what is termed "Strong Baker's," although the "Patents" and "Straight Roller" are largely used. I am informed that the greater proportion of all manufactured for consumption here is ground from hard Manitoba wheat, while the quantity of Ontario fall-wheat flour consumed is very small.

The grading of flour is much the same as in the United States, and it is usually sold on the reputation of the mills rather than any government inspectors, as I am informed.

AMERICAN FLOUR AND WHEAT.

A Chicago firm formerly doing some business in Canada stated that their most popular selling grade in this country, especially in Toronto, Montreal, and Quebec, was what they termed a spring wheat bakers' flour, which was "used extensively in what is called the bakers' mixture."

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*The consuls at Coaticook and Gaspé Basin report that no American flour is received in their districts.

The quantity of wheat and flour imported from the United States into the port of Montreal for the past three years is given in the following table, and also the amount of the same imported for consumption:

Year ending June 30—	Total imports.		For consumption.	
	Wheat.	Flour.	Wheat.	Flour.
	Bushels.	*Barrels.*	*Bushels.*	*Barrels.*
1891	2,453,647	15,272	40,962	9,459
1892	4,936,470	19,291	42,094	6,512
1893	4,110,229	21,096	1,825	4,005

Prior to the year 1890 the import duty on wheat was 15 cents per bushel and 50 cents per barrel on flour, and even with this restriction a small trade in flour for consumption was possible; but in March of that year the duty was increased to 75 cents per barrel, and that increase seemed to have the effect of closing this market to the United States.

The Chicago firm already referred to informed me that on the basis of 50 cents duty per barrel they were able to compete, to some extent, with Canadian millers throughout Ontario, Quebec, and the lower provinces, and, although the margin was small, they were able to do business, working closely; but after the increase to 75 cents they were entirely shut out.

The imports from the United States for consumption at this port dropped from 81,000 barrels in 1889 to 4,000 barrels in 1893, as will be seen in the following statement of imports for each of the past five years ending June 30:

	Barrels.
1889	80,997
1890	31,216
1891	9,460
1892	6,513
1893	4,006

There is no wheat or flour imported from any other country, and, as shown in this table, but very little of that from the United States is for consumption.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange in this city are equal to demands and to those of cities anywhere of equal size and importance, and that the facilities for shipping from the United States are good, both by rail and water, may be inferred from the figures above (and to follow), showing the quantity of wheat brought to this port during the past few years. The receipts from all points by water are about double the quantity received by rail.

OBSTACLES TO TRADE.

With respect to the obstacles to extension of the trade in wheat and flour and the prospect for doing a more extensive business, it may be stated that the chief and probably sufficient obstacles to extension are, first, the quantity of wheat grown within the limits of the Dominion, more especially in Manitoba and the Northwest, and, second, the import duty.

The first obstacle is not insurmountable, and, although competition might be sharp, it could be met with a fair degree of success; but the second is substantially prohibitive and places this market entirely beyond the reach of dealers in the United States.

RECEIPTS OF WHEAT AND FLOUR.

The increase in the amount of wheat received at this port for export and consumption is quite noticeable, and that this is owing to increased production in Canada rather than to imports from the United States is clearly shown in the following table of receipts for the past six calendar years:

Years.	Total receipts.	From the United States.	From Canada.
	Bushels.	*Bushels.*	*Bushels.*
1888	5,048,809	1,247,228	3,801,581
1889	3,836,166	2,039,858	1,796,308
1890	4,155,970	2,145,626	2,010,334
1891	8,389,687	4,274,784	4,114,898
1892	11,174,939	4,456,294	6,718,645
1893*	8,257,094	934,106	....

* Six months.

The receipts of flour during the same period were as follows:

Years.	Total receipts.	From the United States.	From Canada.
	Barrels.	*Barrels.*	*Barrels.*
1888	933,121	66,223	866,898
1889	968,876	59,481	909,395
1890	978,843	28,870	949,973
1891	1,153,421	18,062	1,135,359
1892	986,888	10,285	976,603
1893*	795,286	16,781	....

* Six months.

WENDELL A. ANDERSON,
Consul-General.

MONTREAL, *January 6, 1894.*

SHERBROOKE.

STANDARD OF LIVING.

The living in this district is generally good, and the people would buy and use a great deal more American flour than they do if they could buy it as cheaply as, or more cheaply than, Canadian flour that comes from the northwest of the Dominion of Canada.

QUALITY OF FLOUR CONSUMED.

The grade of flour mostly used in this district is the "Strong Baker's," which comes from Manitoba. There are some other grades of flour, such as the "Hungarian," sold in this district, but the "Strong Baker's" is the most extensively sold.

AMERICAN FLOUR AND WHEAT.

There were 152 barrels of American flour imported into this district in the year ending June, 1891, 30 barrels in the year ending June, 1892, and 311 barrels in the year ending June, 1893.

There was no American wheat imported in the district during 1891, 1892, and 1893.

There was no wheat flour, nor any wheat, imported into this district from other countries during the same period.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are very good, and the facilities for shipping from the United States to this port are also very good by railway.

OBSTACLES TO TRADE.

The only obstacle that I can see to the extension of trade in American flour is the duty of 75 cents per barrel that the Canadian Government imposes upon American flour. If that duty were reduced, there is no doubt but there would be a large increase of trade in American flour in this district. I have talked upon the subject to different flour merchants here, and they all say that they would like to handle the American flour if they could buy it more cheaply than, or even as cheaply as, Canadian flour.

BENJAMIN LENTHIER,
Consul.

SHERBROOKE, *January 8, 1894.*

Sl. 990

Vol. XLIV. No. 162.

CONSULAR REPORTS.

MARCH, 1894.

COMMERCE, MANUFACTURES, ETC.

[FOR TABLE OF CONTENTS, SEE FIRST PAGE.]

DEPARTMENT OF STATE * UNITED STATES OF AMERICA *

WASHINGTON:
GOVERNMENT PRINTING OFFICE.
1894.

PUBLICATIONS OF THE BUREAU OF STATISTICS.

In addition to the monthly CONSULAR REPORTS, the following works have been published by the Bureau of Statistics:

"Labor in Europe," 1878, one volume; "Labor in Foreign Countries," 1884, three volumes; "Commerce of the World and the Share of the United States Therein," 1879; "Commerce of the World and the Share of the United States Therein," 1880-'81; "Declared Exports for the United States, First and Second Quarters, 1883;" "Declared Exports for the United States, Third and Fourth Quarters, 1883." "Cholera in Europe in 1884," 1885; "Trade Guilds of Europe," 1885; "The Licorice Plant," 1885; "Forestry in Europe," 1887; "Emigration and Immigration," 1885-'86 (a portion of this work was published as CONSULAR REPORTS No. 76, for the month of April, 1887); "Rice Pounding in Europe," 1887; "Sugar of Milk," 1887; "Wool Scouring in Belgium," 1887. "Cattle and Dairy Farming in Foreign Countries," 1888 (issued first in one volume, afterwards in two volumes); "Technical Education in Europe," 1888; "Tariffs of Central America and the British West Indies," 1890.

The editions of all these publications except the one last mentioned are exhausted.

Information relating to special subjects—secured by circulars addressed to consular officers—increased to such an extent that at length in 1890 the Department decided to publish such reports in separate form to be entitled "Special Consular Reports." There are now nine volumes of these "Special Consular Reports:"

Vol. 1 (1890).—"Cotton Textiles in Foreign Countries," "Files in Spanish America," "Carpet Manufacture in Foreign Countries," "Malt and Beer in Spanish America," and "Fruit Culture in Foreign Countries."

Vol. 2 (1891).—"Refrigerators and Food Preservation in Foreign Countries," "European Emigration," "Olive Culture in the Alpes Maritimes," and "Beet Sugar Industry and Flax Cultivation in Foreign Countries."

Vol. 3 (1891).—"Streets and Highways in Foreign Countries."

Vol. 4 (1892).—"Port Regulations in Foreign Countries."

Vol. 5 (1892).—"Canals and Irrigation in Foreign Countries."

Vol. 6 (1892).—"Coal and Coal Consumption in Spanish America," "Gas in Foreign Countries," and "India Rubber."

Vol. 7 (1892).—"The Stave Trade in Foreign Countries," and "Tariffs of Foreign Countries."

Vol. 8 (1892).—"Fire and Building Regulations in Foreign Countries."

Vol. 9 (1892 and 1893).—"Australian Sheep and Wool," and "Vagrancy and Public Charities in Foreign Countries."

Vol. 10 (1894).—"Lead and Zinc Mining in Foreign Countries."

Of these Special Reports "Cotton Textiles in Foreign Countries," "Files in Spanish-America," and "Malt and Beer in Spanish America" are exhausted.

The Bureau of Statistics of the Department of State will be grateful for the return of any monthly or special numbers of Consular Reports.

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CONSULAR REPORTS.

COMMERCE, MANUFACTURES, ETC.

VOL. XLIV. MARCH, 1894. No. 162.

FRENCH SWITZERLAND.

COMMERCIAL DEPRESSION.

The present year has not been a prosperous one. It has been prosperous neither to the merchant, the manufacturer, nor the smaller tradesmen of the several cities and towns of this consular district, which comprises nearly all of what is known as French Switzerland, including such large and flourishing towns as Geneva, Lausanne, Vevey, and St. Croix. The trade of all Europe has been more or less disturbed, and our own great country has also had its panic. These conditions have operated against French Switzerland as against other manufacturing countries. The disturbance in Brazil has also seriously affected Geneva. The manufacturers of fine watches, costly enameled jewelry, and fine musical boxes and orchestrions had, until the recent revolution and the events that preceded it, extensive trade relations with the South American Republic; but the disturbances of the past year have almost completely destroyed this profitable business, and within the past six months very few goods have been exported to the Brazilian markets.

Exports from this consular district to the United States show a steady decline since the 1st day of January, 1893. The Swiss merchants and manufacturers, however, who sent costly exhibits to the World's Fair at Chicago have profited more or less by the sale of goods there. This has also, perhaps, had something to do with the large decrease in fall exports to the United States from this district. From January 1, 1892, to November 1, 1892, the value of declared exports from this consular district to the United States was, according to the quarterly returns of this office, $838,516.10; for the same period of 1893, $672,486.88; decrease in 1893, $166,029.22. During November, 1892, the value of declared exports was $83,243.22; November, 1893, $62,430.10; decrease, $20,813.12.

The present month of December has begun rather briskly, however, and it is the belief of the merchants with whom I have talked, and who are directly advised by their agents in America, that the present indications are more favorable, and that the approaching year will show an increased volume of business with the United States. Without pretending to discuss the merits of the question, and merely with a desire to present a faithful report of the business sentiment here, I call attention to the fact that Geneva merchants and financiers seem unanimous in the belief that the falling off of their trade with the United States has been due to the operations of the so-called Sherman silver bill. The McKinley tariff, they contend, has hurt the manufacturers and exporters of cheap articles, but it has not interfered to any great extent with exporters of high-grade goods, such as fine watches, fine enamels, and costly musical instruments.

The following table shows in detail the falling off in declared exports from this district to the United States for the first nine months of 1893 as compared with the same period of 1892:

Articles.	1893.	1892.
Watches and watch material	$265,645.59	$354,352.83
Music boxes	144,370.95	174,593.78
Condensed milk	83,118.15	95,888.96
Leather	50,708.63	72,340.65
Sundries	66,213.48	58,096.67
Total	610,056.80	755,272.89

The decrease during 1893 was $145,216.09.

The tradesmen of Geneva, Lausanne, and Vevey, the three principal shopping centers of this consular district, have suffered greatly by the absence of American tourists this year. The so-called "globe trotter," in doing the continent of Europe, seldom fails to visit Geneva, the most beautiful and interesting city in Switzerland. He buys here watches, jewelry, music boxes and the like in considerable quantities. And the ladies of our country, finding it a cheap market for seal-skin cloaks and other fine fur garments, have been faithful and generous patrons of the several large Geneva establishments that deal in those goods. Indeed, such excellent patrons are our countrymen, particularly our countrywomen, that it is told of a fashionable Genevese milliner that on a certain occasion, while discussing her American clients, she looked devoutly heavenward and said with great earnestness and eloquence: "It is God who sends us the Americans." But during the present year there have been comparatively few American tourists in Europe, and consequently the Genevese milliners and other enterprising tradespeople seem to feel that Providence has in a measure for the time being overlooked them. They believe, and perhaps very correctly, that the absence of our people this year is due jointly to the superior attractions of the Columbian Exposition and to the financial depression in the United States. It is observed, in spite of this, however, that the ranks of the permanent American colony have not been at all thinned, but, on the other hand, augmented. Any Sunday morning at least one hundred of our people can be found attending divine service at the little American church in the rue du Virons,

LABOR AND AGRICULTURE.

Labor seems satisfied with itself and its employers in this consular district. Workingmen here are serious and patient people. They get small wages; but the cost of living is proportionately small, and they have their pleasures as well as the necessaries of life. From the fact that few of them seem moved by the spirit of emigration, it would appear that they consider themselves better off here than they would be elsewhere.

In this consular district, in spite of decreased production and bad business, nearly all skilled workmen have been steadily employed during the present year, and there are few evidences of idleness and suffering. A considerable proportion of the working class is composed of domestic servants of both sexes, who are satisfied to be fed and housed by their employers, with small wages in addition. A good cook, for example, may be had here for from $6 to $8 per month, and a capable man of all work for the same price. A Swiss gentleman on a thousand a year is considered tolerably well to do. He may keep several servants and maintain his establishment in very good style. None the less, Americans who come here to live complain that the cost is very little, if any, cheaper than at home. This is because they do not understand the skillful and mysterious economies practiced by Swiss housekeepers. But in any event, as I have said before, the working classes here seem quite contented with their condition. There are few strikes and few other evidences of labor organized against capital. The Swiss Government has a great deal to do with this satisfactory condition. It is the policy and practice of the Government and municipalities to employ only native Swiss workmen on all public works. Outside labor has no chance at all here, unless it be of a certain skilled sort. To show the habit and fidelity of the Government in giving employment only to natives, this example may be cited: Until recently the P. M. & L. Railroad Company, a great French corporation, has had control of the immense railway station, with all its terminal facilities, in this city. On the first of the approaching year the great station comes back into the possession of the Swiss Government, and the 600 French employés have already been given to understand that their places will be filled as soon as possible by Swiss employés.

The action of the Government in thus protecting and looking out for its own people to the exclusion of foreigners has much to do with the contentment of the working classes.

The principal agricultural product of French Switzerland is grapes, from which are distilled the cheap wines of the country. The grape crop this year has been not only the largest, but the best, since 1865. There were few vineyards that did not yield an unusual abundance, and as a consequence the grape-growers in this district feel that they have much to be thankful for. They find a ready market for their wines in all the commercial centers of the district and are satisfied with the prices. Yet, in spite of this abundant yield, the supply is no more than sufficient for the home demand, and there is no exportation at all of these cheap wines. On the other hand, the local consumption of native cheap wines is so great that the producers of Savoy and other adjacent countries have heretofore found a considerable market for their red and white wines all over French Switzerland.

Grape-growers agree that the extraordinarily dry season of 1893 conduced to the excellent yield of their vineyards. But in another direction this dry season has operated very seriously. The almost unparalleled drought of July, August, and September resulted in an utter failure of the hay and corn crops. As a consequence, farmers and dairymen are very much distressed for want of food for their cattle, and this condition will be aggravated in the hard winter months of January, February, and March. Already there has been considerable importation of hay and other food stuffs from European seaports, and there is talk of turning directly to the United States for further supplies. Whether or not this is practicable remains to be seen. Certainly, if hay and the cheaper grades of mixed food stuffs for live stock, such as shorts, bran, and the like, could be exported from the United States to Switzerland at a sufficiently small cost of transportation to leave a profit to the seller on a basis of tolerably fair prices, there would be a ready market, not only in Switzerland, but in the adjacent countries, where there is always a deficiency of those stuffs.

It has been several times suggested to me that Switzerland offers an excellent market for American corn as a food for live stock, and it is possible that American grain dealers might find the matter worth looking into.

In view of the present scarcity of the food stuffs above referred to, many farmers and dairymen, fearing their cattle might die of starvation, have been compelled, I am told, to kill and sell many of them for beef. This has some significance in another direction. It means probably a considerable reduction in the production of Swiss cheese next year, and it is possibly advisable for American importers to take that matter into consideration. However, owing to the present high rate of duties imposed by France against Switzerland, the French market has recently been almost entirely closed to Swiss cheese-producers, and there is just now an unusually large stock of cheese on hand.

BENJ. H. RIDGELY,
Consul.

GENEVA, *December 9, 1893.*

EMIGRATION FROM CHRISTIANIA IN 1893.

The total emigration from this port during the calendar year 1893 was 11,319, a decrease of 117 as compared with the year before. All but 26 persons, who went to Canada, Australia, and Africa, left for the United States.

The emigrants were 5,412 male and 3,975 female adults, besides 1,932 children, of whom 1,006 were boys and 926 girls.

Of the emigrants, 1,003 belonged to this city and 6,457 to other places in this country; 2,486 came from Sweden, and 1,288 were reported to be Americans of Norwegian origin who had been visiting their native land; 85 were born in other European countries.

The emigrants are believed to have carried with them in money 12,815 kroner ($3,434); 5,117 emigrants had their passage prepaid in America.

The total passage money paid for the transportation of all emigrants amounted to 957,354 kroner ($256,570).

Number and ages of emigrants.

Lines.	Passage money paid in Norway.			Passage money paid in America.			Total.
	Adults.	Children.		Adults.	Children.		
		1 to 12 years.	Under 1 year.		1 to 12 years.	Under 1 year.	
Allan	677	97	27	902	141	25	1,869
American	122	12	7	163	32	8	344
Anchor	84	11	5	12	....	....	112
Beaver	46	2	3	19	....	1	71
Cunard	976	97	39	426	46	14	1,598
Dominion	124	20	8	157	27	5	341
Guion	165	29	8	39	6	....	247
Hamburg packet	46	5	1	9	4	1	66
Inman	332	33	10	151	24	7	557
North German Lloyd	15	5	1	7	....	....	28
Scandia	383	64	14	123	21	5	610
Thingvalla	1,437	238	71	1,754	464	105	4,069
White Star	859	66	18	328	23	14	1,308
Cunard	44	1	....	48	6	....	*99
Total	5,310	686	212	4,138	794	185	11,319
Total for the year 1892	5,155	663	191	4,423	862	142	11,436

* Forwarded for the Thingvalla line after the wreck of the steamship *Norge*.

GERH. GADE,
Consul.

CHRISTIANIA, *January 6, 1894.*

BRITISH LAW CONCERNING CATTLE FOOD.

An act of Parliament, known as the "fertilizer and feeding stuffs bill," went into effect in the United Kingdom January 1, 1894, which is likely to seriously affect the United States export trade in linseed and cotton cake. One purpose of the bill is to compel dealers to give to purchasers a guaranty of the character and quality of the feed stuffs sold to them.

The trade in oil cake for feeding cattle is one of great magnitude in the United Kingdom. The trade at Dublin handles annually about 7,000 tons of linseed or oil cake, and about one-third as much cotton cake. The Dublin trade probably supplies half the Irish demand. But the Irish demand is insignificant as compared with the English and Scotch, as a very large proportion of Irish cattle is sent to those countries to be fattened, the number being estimated at 1,000,000 head annually.

The chief sources of foreign supply of linseed cake are the United States, Canada, and Russia. Of the 7,000 tons of linseed or oil cake handled by the Dublin trade, about 2,000 tons are from the United States. The United States also furnish the Dublin trade about 1,500 tons of decorticated cotton cake. The chief houses in Dublin engaged in the oil-cake trade have held a meeting and taken the opinion of counsel as to their liability under this new act. The opinion of counsel is that the trade may be conducted as usual, the law complied with, and criminal prosecution avoided by invoicing and branding linseed cake which is 95 per cent pure "linseed cake, pure," and in the case of American oil cake, wherein the constituents are not fully known, "American oil-cake compound" or "linseed cake, a compound of linseed and other seeds and substances."

While it is held that dealers may thus protect themselves from criminal liability, they are still subject to civil action for damages on the part of the purchaser, and it is thought that there is no way of avoiding this latter liability except by the trade's refusing to guaranty foreign brands of the cake in which the constituents are not fully guarantied by the mills furnishing it. The Canadian trade now guaranties its linseed cake 95 per cent pure, which for feeding purposes is regarded as pure. Both the Canadian and Russian cakes outrank the United States cake in the Dublin market, the Russian cake commanding about $3 per ton more and the Canadian cake about 87 cents per ton more.

Under this new act Dublin dealers are a little dubious about handling oil cake from the United States, as it is alleged that it is often mixed with other seeds, some of them of a character deleterious as cattle food. It is also alleged that some of the American mills practice adulterating the cake by an addition of dust. These conditions leave the dealers liable to civil prosecution, and, if they shield themselves against this by refusing to guaranty, it is thought that it will operate very much to the injury of the oil cake thus discriminated against.

Thus it will appear that if the American linseed mills propose to hold their markets in the United Kingdom it will be necessary for them to furnish a cake of guarantied purity, and in case of mixed cake a guaranty of the compounds and their proportions in the mixture. If the American oil cake has been hampered in the British market on account of its supposed inferiority to its Russian and Canadian rivals, it will now fare greatly worse if dealers are compelled to refuse to handle it unless purchasers are willing to buy it without guaranties. The present juncture, however, would seem to be a propitious time for increasing the oil-cake trade in the British market, either by furnishing a guarantied pure article or a compound with guarantied components, for I understand that the same difficulty in regard to constituents applies in a certain measure to the Russian supply. This, with the lower price in our favor, should give the American cake a decided lead if its quality was strengthened by sufficient guaranties.

Attention is called to the following extracts from the "fertilizers and feeding stuffs bill:"

REGULATIONS AS TO SALE OF FEEDING STUFFS.

(1) Every person who sells for use as food for cattle any article which has been artificially prepared shall give to the purchaser an invoice stating the name of the article and whether it has been prepared from one substance or seed or from more than one substance or seed, and this invoice shall have effect as a warranty by the seller of the statements contained therein.

(2) Where any article sold for use as food for cattle is sold under a name or description implying that it is prepared from any particular substance, or from any two or more particular substances, or is the product of any particular seed, or any two or more particular seeds, and without any indication that it is mixed or compounded with any other substance or seed, there shall be implied a warranty by the seller that it is pure, that is to say, is prepared from that substance or those substances only or is a product of that seed or those seeds only.

(3) On the sale of any article for use as food for cattle there shall be implied a warranty by the seller that the article is suitable for feeding purposes.

(4) Any statement by the seller of the percentages of nutritive and other ingredients contained in any article sold for use as food for cattle made after the commencement of this act in an invoice of such article, or in any circular or advertisement descriptive of such article, shall have effect as a warranty by the seller.

NEWTON B. ASHBY,
Consul.

DUBLIN, *January 5, 1894.*

MERCHANT MARINE OF DIFFERENT COUNTRIES.

The following statistics relating to the merchant marine of the principal countries, taken from the Antwerp Precurseur of January 4, 1894, may be of interest. The rank is always determined by the tonnage and not by the number of vessels:

Number and tonnage of steamships.

Country.	Number.	Tons.
Great Britain	5,694	5,886,621
Germany	779	801,984
France	500	480,921
United States	423	447,122
Norway and Sweden	949	417,414
Spain	354	289,067
Holland	201	207,240
Italy	218	203,851
Russia	297	153,424

The statistics of the sailing vessels show considerable variation, the chief of which is that the United States go to the third place, as is seen from the following table:

Number and tonnage of sailing vessels.

Country.	Number.	Tons.
Great Britain	9,277	3,574,847
Norway and Sweden	4,688	1,592,585
United States	3,471	1,423,275
Germany	1,286	667,219
Italy	1,904	535,471
Russia	7,704	356,471
France	1,490	257,444
Greece	1,121	245,035
Denmark	870	159,085

From the two tables above, the following table of totals is made, showing the rank of the seven largest countries when both steamships and sailing vessels are considered:

Country.	Number.	Tons.
Great Britain	14,971	9,461,468
Norway and Sweden	5,637	2,009,999
United States	3,894	1,870,397
Germany	2,165	1,469,203
Italy	2,122	739,322
France	1,990	738,365
Russia	8,001	509,895

Great Britain, it is observed, leads in both steam and sailing vessels, and in total tonnage exceeds that of the other six countries combined.

Out of 37 new steamers of between 6,000 and 8,000 tons appearing in 1893, 22 fly the British flag, France following with 9.

The two largest steamers—*Lucania* and *Campania*—12,950 tons each, also belong to England.

HARVEY JOHNSON,
Consul.

ANTWERP, *January 10, 1894.*

EXPORTATION OF RICE PROHIBITED BY KOREA.

During the month of September and a part of October Korea experienced severe and very unseasonable storms of rain and wind, which threatened the destruction of the growing crops. Even rice was said to be so greatly damaged that a scarcity amounting almost to a famine was feared. Rice doubled in price, and the Government was given much uneasiness by the dissatisfaction of the people. To allay this dissatisfaction, therefore, in accordance with treaty stipulations they announced on the 18th of October that after the expiration of the one month's notice required by treaty the export of grain would be prohibited. This was afterwards modified or explained so as to include only cereals and to exclude pulse or beans, which was a very important matter, as beans form one of the chief articles of export. Later all produce but rice was exempted from the prohibition, and the date of enforcement was advanced to December 7 (to-day). The prohibition is now in full force and is being carefully observed.

During the latter part of October and the early part of November warm, dry weather followed the severe rains, and it was then found that the crops would be almost up to the average. As the great scarcity of rice had been caused by the unseasonable weather which had delayed for almost six weeks the harvesting, drying, and thrashing of the crop, and as the old crop was exhausted and the new crop had not come in, the people had to exist for about one-eighth of a year longer than had been provided for by the regular supply of old rice.

Although it was soon known that the crop would not be a failure, rice did not come in, and the price kept up. This was due to the official interference in the interior, and perhaps to the mistaken impression that the prohibition meant that rice was not even to be sold to foreigners; and as Japanese, Chinese, and Americans handle a great deal of rice, trade was almost entirely suppressed.

When this interference in trade was explained to the Government, and the officials of the central power here in the capital saw they were paying exorbitant prices for rice as a result of this unwise interference with trade, which was also working great injury to the country in other ways, prompt measures were taken to suppress all illegal taxation and other interference. The result is that rice is now coming in so freely that the price has fallen to about the normal standard, and the quantity is so plentiful that it is very probable the prohibition will be removed before the new year.

The American firm of Morse, Townsend & Co., at the port of Chemulpo, conduct a rice-cleaning mill supplied with Engelburg hullers, and rice cleaned in their mill is highly prized. They buy it in the paddy (hulls) and sell it after hulling. I quote the present market price as furnished me by the above firm: Best hulled rice is now selling for $2.50 (Mexican) per picul (133⅓ pounds)—say $1.87 (Mexican) per 100 pounds, or at 55 is equal to $1.03 in gold per 100 pounds.

I see that China rice was quoted in San Francisco six weeks since at $5 in gold per 100 pounds, while Carolina rice was quoted at 8 cents per pound retail.

Korean rice is of excellent quality. Koreans who have lived some time in America complain that our rice is much inferior to their own. Of course, prejudice and homesickness may account for much of this feeling, but I am told that when rice is plentiful in Japan the Japanese import Korean rice for their use and export their own.

There is great aversion in Korea to the export of rice. The people have not yet learned the law of supply and demand, and think that exportation means exhaustion at home. But that rice does form a considerable item in the exports is seen by the table which I append, showing the exports of this grain since the organization of the present customs department. The figures in this table for 1893 refer only to the first nine months and do not include the period when the export of rice should be most active. The values for this period are not obtainable. They were perhaps slightly less than the present values. I can not give the gold values for the previous years, as the price of silver differed during different portions of each year.

The increased export in 1890 and 1891 was due to the fact that with unusually good crops in Korea there was a scarcity in Japan, to which country Korean rice is exported almost exclusively.

The Government interference with trade above alluded to means much more than might be at first supposed, for, as they can only pay for imports with exports, owing to the lack of an available currency, the stoppage of exports means a suppression of all trade, since in such case there is nothing with which to pay for goods imported.

Exports of rice from Korea, 1885-'93.

Year.	Quantity.	Value.	
		Total (Mexican).	Per cwt. (U. S.).
	*Piculs.**		
1885	9,832	$15,691	$1.20
1886	8,454	12,193	1.08
1887	67,589	90,071	1.00
1888	16,065	21,810	1.01
1889	34,527	77,578	1.68
1890	874,665	2,037,868	1.75
1891	928,010	1,820,319	1.47
1892	487,601	998,519	1.54
1893	176,589	....	1.03

* 1 picul = 133⅓ pounds.

H. N. ALLEN,
Acting Consul-General.

SEOUL, *December 7, 1893.*

THE SULPHUR INDUSTRY OF JAPAN.

Sulphur, called in Japanese "iwo" or "yuwo," is found as a glossy product of sublimation, often covering the crater walls, crevices, and clefts of active and extinct volcanoes throughout the country. By far the greatest amount of Japanese sulphur is formed by decomposition of the sulphurated hydrogen of the very numerous *solfataras.*

The export trade in this article has grown rapidly since the opening of the country to foreign commerce. In the year 1868, the earliest date for which reliable customs statistics are available, there were exported 131 tons, valued at $6,479. Recent returns show the following figures:

Year.	Quantity.	Value.
	Tons.	
1890	20,724	$207,994
1891	21,108	227,866
1892	14,589	199,484

Of this there was shipped to the United States the following:

Year.	Quantity.	Value.
	Tons.	
1890	17,807	$169,201
1891	19,068	196,010
1892	11,446	152,580

Nearly all of the rest went to China.

In February, 1893, there were eighty-four mines in operation, of which only the following—thirteen in number—produced annually more than 100 tons each:

Cho, fu, or ken.	Names of mines.	Refined sulphur produced in 1891.
		Tons.
Hokkaido	Musanosawa	179
	Eyama	171
	Iwaonobori	1,509
	Atosanobori	10,515
	Chidokoyama	2,318
	Ichibishinai	3,627
	Ransuyama	820
Akita	Ishikarito	753
Miyagi	Nishinokawara	224
Gumma	Shironeyama	911
Tochigi	Chausuyama	169
Oita	Kokonoyeyama	317
Kagoshima	Iwojima	410
Total		21,923

Ninety-five other mines were located and under trial excavation by Government permit. No official estimate has been made of the quantity of sulphur still available. The total product of the country during 1891 (that being the latest year for which reports are published) was 44,505 tons, of which 21,923 tons were refined sulphur.

W. D. TILLOTSON,
Consul-General.

KANAGAWA, *November 24, 1893.*

TAX ON MONEY SENT TO RUSSIA.

In June last a law went into force to the effect that all Russian currency sent from abroad by letter or packet into Russia should pay a Government tax of one copeck per 100 rubles or less (one cent for every $100). This regulation further stipulates that the exact sum of money inclosed in a letter must be declared on the outside of the envelope, failing in which a penalty of 25 per cent of the sum inclosed will be exacted. It is this penalty stipulation which seems to have been generally misunderstood in the United States, and hence the object of this report.

To illustrate: If a bank or an individual abroad should inclose 1,000 Russian rubles in a letter and should not declare on the envelope the amount inclosed, the customs department of the post-office would construe such an omission as an attempt to evade the law in the case and would confiscate 250 rubles of that inclosure as a penalty. If, however, the sender should write on the envelope "1,000 rubles within," only 10 copecks would have to be paid.

When bank drafts are bought abroad, no matter in what currency they may be drawn, a Government stamp duty will be charged thereon through the local banks according to the scale given below. This stamp-duty tax is computed according to a fixed rate of exchange on the moneys of different countries.

Rates of Government stamp duties charged on foreign drafts.

Amount.	Tax.	Amount.	Tax.
	Rubles.		*Rubles.*
1 to 50 rubles	0.10	2,000 to 3,200 rubles	3.70
50 to 100 rubles	0.15	3,200 to 4,000 rubles	5.15
100 to 200 rubles	0.30	4,000 to 6,400 rubles	6.80
200 to 300 rubles	0.40	6,400 to 8,000 rubles	9.00
300 to 400 rubles	0.55	8,000 to 10,000 rubles	11.40
400 to 500 rubles	0.70	10,000 to 12,000 rubles	13.80
500 to 600 rubles	0.80	12,000 to 15,000 rubles	15.60
600 to 700 rubles	0.90	15,000 to 20,000 rubles	21.00
700 to 800 rubles	1.00	20,000 to 25,000 rubles	27.60
800 to 900 rubles	1.15	25,000 to 30,000 rubles	33.60
900 to 1,000 rubles	1.20	30,000 to 40,000 rubles	42.00
1,000 to 1,500 rubles	1.90	40,000 to 50,000 rubles	54.00
1,500 to 2,000 rubles	2.50		

It will be seen from the foregoing that the Government tax on Russian currency sent from abroad into the Empire by letter or in packets is merely nominal, provided the proper declaration is made on the envelope, and that the tax on foreign drafts is moderate.

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *December 27, 1893.*

INDUSTRIES OF CASTELLAMMARE AND SALERNO.

I.—CASTELLAMMARE.

Although it has been impossible to obtain later statistics than December, 1892, and in some cases only for 1890, yet the following figures give a very complete statement of every kind of industrial pursuit within the commune of Castellammare.

The crisis through which Italy has been passing, and which now appears to be at its acute stage, has had a depressing effect on all business enterprises. It is difficult for merchants and manufacturers to obtain advances from the banks on the security of commercial paper, and the present panic, which has caused the failure of some of the largest banking establishments in central Italy, will undoubtedly have a disastrous influence upon all business.

It behooves American exporters to exercise great caution in their dealings with this country, as credit has received such a shock that it is impossible to judge the ultimate extent of the present financial disturbances, which threaten to exceed anything of the kind known in the history of this country.

MINERAL SPRINGS.

The mineral waters for drinking and baths are of such variety and importance at Castellammare as to require a special report, which will follow. They consist of saline, alkaline, sulphurous, and iron waters, and the establishment where they are collected is owned by the commune.

MERCHANT SHIPPING.

The number of vessels provided with a certificate of nationality in existence December 31, 1892, and registered at the port of Castellammare di Stabia is stated in the tables following.

The long-coasting navigation comprises that of the Mediterranean and the seas derived from it, the Black Sea, and the Sea of Azov; the Atlantic coasts of Spain, Portugal, France, and Great Britain; North and Baltic seas; west coast of Africa to Senegal, comprising the islands within 300 miles of the coast; the Red Sea, Persian Gulf, and India to Bombay.

Short-coasting navigation comprises the coasts of Italy, Corsica, Provence to Cette, the east coast of the Adriatic to Vallona, in Albania, and the coasts of Algiers and Tunis.

Sailing vessels.

Description.	No.	Tons.
Total number of sailing vessels	365	75,146
Long-voyage navigation	71	44,138
Long-coasting navigation	48	21,982
Navigation of the Mediterranean, short coasting, and pleasure	246	9,026

There were two wooden steamships of 126 gross tons and 71 net tons. Their nominal horse power was 41 and the effective horse power 205.

Fishing vessels.

Description.	No.	Tons.
Fisheries	1,429	2,566
Coral fisheries	1	2

Vessels launched from five yards.

Description.	No.	Tons.
1 to 100 tons	14	731
101 to 500 tons	1	177
Above 500 tons	1	521
Total	*16	1,429

* Approximate value, $68,022.

Men employed in the merchant marine.

Description.	Number.	Description.	Number.
First class.		*Second class.*	
Captains	710	Engineers and naval constructors	20
Owners, mates, clerks, and navigators	450	Skilled wood-hewers, calkers, and iron-workers	2,961
Masters	548	Coasting fishers	2,473
Sailors and apprentices	9,588	Boatmen and masters (local traffic)	2,061
Machinists	5	Practiced pilots	7
Firemen and stokers	242		
Total	11,543	Total	7,522

BOUNTIES ON SHIPBUILDING.

The law of premiums for shipbuilding, which went into operation January 1, 1886, and that of premiums on repairs to shipping and machinery of the 30th of June, 1889, awarded the following compensations from the Italian Government:

New wooden sailing vessels	per gross ton	$3.15
New iron or steel sailing vessels	do	13.86
New iron or steel steamers	do	13.86
Machinery	per indicated horse power	2.25
Boilers	per 220 pounds	1.71
Apparatus and auxiliary machinery	do	1.98

Notwithstanding these premiums, shipbuilding fell off seriously in 1892. In 1891 the estimated value of vessels built in all Italy was $1,902,253.76, and in 1892 it was $989,028.36,

COMMERCE AND NAVIGATION.

Movement of navigation during the year 1890 in the ports of the district of Castellammare.

Ports.	Vessels arrived.			Vessels sailed.		
	No.	Measurement.	Merchandise landed.	No.	Measurement.	Merchandise loaded.
Castellammare:		*Tons.*	*Tons.*		*Tons.*	*Tons.*
International navigation	37	10,638	8,103	69	11,532	3,071
Coasting navigation	1,136	67,147	42,956	1,087	59,792	26,048
Total	1,173	77,785	51,059	1,156	71,324	29,119
Vico Equense	16	268	14	16	268	52
Piano di Sorrento	74	43,923	2,720	75	42,992	14,685
Sorrento	219	37,384	1,394	219	37,384	2,218
Massalubrense	446	39,865	1,004	446	39,751	1,155
Capri	893	6,924	7,728	892	6,917	398

The months of August, September, and October are the busiest months for commerce.

METAL WORKS.

There is but one establishment working in iron and steel at Castellammare, called the Impresa Italiana di Costruzioni Metalliche, or the Italian Metal Work Company. It makes metal bridges, roofs, cofferdams for foundations at compressed atmospheres, and railway rolling stock. There have lately been made here large and important iron bridges for Italy and the Argentine Republic. The works are furnished with four steam engines of 400-horse power and employ 800 workmen.

There are three mechanical establishments for metal-working, with and without foundries, fitted with four steam engines of 400-horse power, employing 804 workmen, and two iron foundries using two steam engines of 8-horse power and employing 22 individuals, of whom 5 are boys under 15 years.

The Government has a royal shipyard at Castellammare, divided into eight sections. Here are made ships' hulls of iron or steel and the other iron parts used in their construction, floating docks, sheet-iron sheathing, etc. Forges and special machinery for working iron are arranged in two large workshops.

The following table shows the number of those employed in the eight sections:

Sections.	Men.	Boys.	Total.
Iron construction	977	40	1,017
Joiners' workshops	133	27	160
Blacksmiths' workshops	328	16	344
Foundry	18	2	20
Carpentry workshops	80	....	80
Calkers	24	....	24
Cabinetmakers	56	4	60
Laborers	158	....	158
Total	1,774	89	1,863

Iron and steel vessels built in this yard are generally fitted out at the arsenal at Naples.

The motive power is furnished by two engines of 80-horse power each, fed by four boilers, and three locomotives of 12-horse power. There are, besides, two engines of 18-horse power for ventilation and blowing the furnaces.

The yard contains two slips for building large vessels and two for smaller ones. The total number of working days in the year averages three hundred.

GAS WORKS.

The works at Castellammare furnish gas also to the town of Gragnano. The number of workmen employed is 25. The number of burners and price of gas are as follows:

Town.	Public.		Private.	
	Burners.	Price per cubic meter.*	Burners.	Price per cubic meter.*
Castellammare	579	$0.51	1,352	$0.07
Gragnano	132	.05	60	.07

* 1 cubic meter=35⅓ cubic feet.

QUARRIES.

The following table shows the details concerning the quarries:

Place.	Species.	Number.	Number of work people.					Average working days per year.
			Males.		Females.		Total.	
			Adults.	Under 15.	Adults.	Under 15.		
Casola di Napoli	Tufa	3	7	7	4	4	22	225
Castellammare	Lime	4	50				50	180
Gragnano	Tufa	3	10	13			23	300
Piano Sorrento	do	4	17				17	107
Sorrento	do	2	6				6	160
Vico Equense	do	3	9				17	110

FURNACES.

The principal limekilns are those of F. Cilento, in the commune of Vico Equense, employing 30 workmen; F. Gargiolo, at Massalubrense, 29 workmen; Prince of Summonte and F. de Angelis, at Piano de Sorrento, each 28 workmen; and James White, at Meta, 23 workmen. All these burn limestone taken from the neighborhood and use wood as a combustible, with sometimes coal from Naples.

There are 25 chalk and plaster furnaces, 16 having intermittent fires and 9 continuous. They produce annually 123,800 quintals (13,618 tons). Two hundred and nineteen work people are employed in them, of whom 29 are under age and 7 females.

MANUFACTORIES.

Cream of tartar.—One at Gragnano employing 5 work people.

Macaroni.—Flour paste in different forms and macaroni are extensively produced at and exported from Castellammare, Gragnano, and Sorrento. There are 78 steam manufactories, employing 984 work people, laboring on an average 231 days of the year.

Olive oil.—This is an important industry, embracing 111 factories, with 123 presses, which employ 648 work people on an average 36 days in the year. For extracting olive oil from the nut grounds by sulphate of carbon there is one factory at Castellammare furnished with one 25-horse-power engine. It employs 20 work people 4 months of the year.

Enological establishment.—There is only one at Castellammare, which makes a type of table wine, in which 15 men work on an average 250 days in the year.

Distilleries.—There are two spirit distilleries, each having 5 boilers and 2 engines of 22 and 32 horse power. One has 13 and the other 11 fermentation vats of 1,461 and 1,856 ettoliters* capacity, producing in all 17,868 ettoliters a year. One employs 32 and the other 14 men.

Silk-spinning.—There are only two establishments—at Meta and Piano di Sorrento. The first has 288 hand spindles, the second 114 spindles. Meta employs only 8 men and 11 women and Sorrento 4 men. The average working days in the year are 112.

Cotton-weaving.—There are two cotton factories in the commune of Castellammare, both worked by steam power. Angelo Poma's factory has a 12-horse-power engine as motive power, 70 looms in continual use, and employs 139 work people, the majority women. They make a coarse cotton sheeting from thread bought at Naples. C. Palmigiano manufactures colored and plain light cloths. The power is a 12-horse-power steam engine working 68 looms, which require 118 work people. Of the total number of work people in these two factories, 235 are women and girls and 22 men. The average number of working days in the year is 284.

Dyehouses.—There are five dyehouses at Castellammare employing 27 men, 8 boys, and 1 girl, who work on an average 173 days in the year.

Knit goods.—S. Maresca, at Piano di Sorrento, has a hosiery factory employing 40 hand looms and 23 workmen. They make silk, woolen, and cotton hosiery. There are, besides, five smaller factories working 25 hand looms and employing 24 workmen.

Cordage factory.—The royal cordage factory for vegetable and metal cables, ropes, and lines employs 189 work people, of whom 157 are men and 32 boys. They twist Italian and Manila hemp, jute, leather cords, and fuses for artillery and cables of steel, iron, and copper. Three engines of 100-horse power, each fed by 5 boilers of the same force, give the motive power. The products of this factory are exclusively for the wants of the army and navy.

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* 1 ettoliter=22⅓ gallons.

Domestic looms.—Of these there are 2,546 in the commune of Castellammare, the majority working cotton, after which come hemp, flax, mixed cloths, silk, and wool in the proportions as named. Silk is woven principally at Piano di Sorrento, Sorrento, and San Giorgio Cremano on 60 looms, which make scarfs, ribbons, caps, and silk material, all known as "Sorrento goods."

Tanneries.—There are four tanneries here, employing 54 workmen, who are employed 257 days in the year. The hides come in part from Italy and the rest from America, India, and China.

Printing and lithography.—There are five establishments, which employ 20 work people, who work on an average 250 days per year.

Carriage-makers.—Five carriage-makers employ 26 workmen and use beech, poplar, and walnut wood.

Coral.—P. Sconamiglio employs 20 women and 4 men in coral-working at Castellammare.

The above represent every industrial employment in the commune of Castellammare.

II.—SALERNO.

The province of Salerno consists of one hundred and fifty-eight communes, 5,071 square kilometers in extent, inhabited on an average by 100 souls per square kilometer.

The increase of population in ten years was only 1.55 per cent.

The emigration is considerable, amounting in 1892 to 5,570 souls, who went to the United States.

EDUCATION.

The proportion of the population above 6 years who can not read or write is enormous, amounting in every 100 inhabitants to 86.04. Seventy-two per cent of the married men were unable to sign their marriage documents.

There were 21 infant schools, attended by 2,010 scholars; 29,190 pupils attend elementary public day schools and 1,842 are educated at similar private institutions. The evening schools take in 6,759 scholars and the fête-day schools 2,141. Seven hundred and twenty-eight students attend the grammar, 50 the high, and 238 the technical schools. There is a small agricultural school at Eboli.

MEANS OF TRANSIT.

The following figures show the means of transit in the province :

	Kilometers.
Railways	222
National and provincial roads	905
Communal roads	450
Total	1,577

COMMERCE AND NAVIGATION.

There are seventeen ports and landings where commerce is carried on, but only two register foreign arrivals and departures—Salerno and Majori—the former numbering 18 vessels of 17,753 total tonnage, which embarked 1,315 tons, and the latter counting 32 arrivals of 17,919 tons, landing 24,976 tons, and 18 departures of 12,633 tons, embarking 260 tons, an insignificant item.

The ports of Torre del Greco and Torre Annunziata, although not in the province of Salerno, are comprised in this district, and the following table, from the last returns of the Ministry of Agriculture, Industry, and Commerce, gives an idea of the annual movement of vessels.

Port.	Vessels arrived.			Vessels sailed.		
	No.	Measurement.	Merchandise landed.	No.	Measurement.	Merchandise loaded.
Torre Greco:		*Tons.*	*Tons.*		*Tons.*	*Tons.*
International navigation	14	1,038	111	15	787	289
Coasting navigation	307	8,640	1,663	309	9,139	2,998
Torre Annunziata:						
International navigation	241	101,159	145,514	211	75,533	19,780
Coasting navigation	1,030	35,470	18,424	1,033	55,709	37,892

AGRICULTURE.

Thirty-five per cent of the total area of arable land is cultivated. The principal products are wheat, Indian corn, olives, and vines; flax and hemp are also cultivated, but in small quantities. The total value of agricultural products is estimated at $12,738,000, but this does not include fruit and vegetables, which form the bulk of the commerce.

Two large factories at Castellabate are devoted to the preparation of dry figs. One employs 215 hands (150 girls under 14 years), who work all the year, producing 3,000 quintals of figs in boxes. The other is only in operation 150 days and employs 120 work people, producing 200 quintals. These figs are exceedingly cheap and well adapted for importation into the United States. At present the great part goes to South America.

LIVE STOCK.

Large portions of this province are unfit for anything but pasturage, and there are fine breeds of horses, cattle, and sheep raised thereon, amounting in all to 335,714 head.

ANIMAL PRODUCTS.

The cheese from mares', buffalo,* and sheep's milk amounts yearly to about 4,800,000 kilograms, worth $1,351,000.

One hundred and eighty thousand kilograms of wool, worth $97,272, are also produced annually.

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* The cattle of the Roman campagna and this district are known as buffaloes.

IRON FOUNDRIES AND MECHANICAL WORKS.

The most important in the province is the Fonderia Fratte, containing three engines of 35 aggregate horse power, which gives employment to 370 work people. Engines, boilers, and various machines are made here.

There are four copper foundries which make rough plates, vases, pots, and pans of copper, which are subsequently sent to Naples to be polished and finished.

The following table shows the number of works and the number of people employed in mineral, metal, and mechanical works and foundries:

Kind of establishment.	Communes.	Number.	Number of workmen.		
			Adults.	Boys under 14.	Total.
Gas works	Salerno	1	8		8
Do	Nocera Inferiore	1	10		10
Grinding sulphur	Salerno	1	40		40
Mechanical works	do	2	350	30	380
Iron works	Giffoni Val Piana	1	6		6
Do	Pellezzano	1	5	2	7
Nail factory	Scafati	1	15	5	20
Iron foundry	Salerno	1	15		15
Copper foundry	Giffoni Val Piana	4	26	14	40
Do	Vietri sul Mare	1	17	5	22
Total		14	492	56	548

At Torre Annunziata there is a large establishment which makes iron beams and girders from old rails and scrap iron bought in the country. It employs two engines of 82-horse power as motors, and 270 workmen are engaged 300 days in the year.

Here, also, is an important Government small-arms factory adopting as motive power 5 steam engines of 102-horse power, fed by 9 boilers of 169-horse power, and 5 water wheels equivalent to 77-horse power. The workmen are principally skilled artisans and number 1,670. The factory can turn out 250 new guns, mounted with saber bayonets and all accessories, daily. The average number of working days in the year is 300.

QUARRIES.

There are in all 24 quarries of pozzolana, limestone, tufa, and stone for millstones, in which 455 work people are employed—138 men, 141 boys under 14, and 32 women, of whom 3 are girls under 14.

FURNACES.

There are 56 establishments burning lime, building materials, terra cotta, crockery, and glass bottles, with 76 furnaces. They employ 908 work people.

CHEMICAL PRODUCTS.

Gunpowder.—There are 24 powder factories, of which 8 are in the commune of Scafati and 16 in eleven communes of the province. At Scafati there is a Government powder factory under the direction of the commander of territorial artillery. It employs 172 work people and has 11 hydraulic motors of a total force of 72-horse power, one 6-horse-power steam engine, and three boilers for heating of the total force of 58-horse power. The annual production is 458 tons, worth $129,310. The materials used are niter from Peru, sulphur and charcoal of this country, and chlorate of potash from Stassfurt. The other factories are of small importance, using hand power, and employ in all some 60 work people.

Soap.—There are 14 soap factories, employing 37 men, 2 boys, and 2 women. They make a coarse soap from olive oil for industrial purposes, wool-cleansing, and household washing.

Wooden matches.—There are 5 of these factories, employing 44 work people. No kind of machinery is used.

Starch.—There are 3 factories of small importance, employing 21 men.

FLOUR MILLS.

Grinding flour is an industry carried on in one hundred and thirty-nine communes of the province at 621 mills, of which 3 are worked by steam and 618 by water power. They give occupation to 1,292 work people--909 men, 165 boys under 14, 204 women, and 14 girls.

Flour paste, known as macaroni, vermicelli, etc., is a very large and important industry, principally carried on in the communes of the coast about Amalfi. There are 164 factories in twenty-seven communes.

The grain comes from the Puglie, and is also largely imported at the port of Torre Annunziata from India and the Black Sea. If American wheat-shippers could deliver cargoes at Castellammare and Torre Annunziata, in the bay of Naples—for which there is every facility for the accommodation of large steamers—at a price to compete with Russian, Egyptian, and Indian grain, there is a large and constant market for their venture. Prices this day range from $3.86 to $4.40 per 220 pounds.

In the manufacture of macaroni there are employed 1,288 men, 336 boys, and 3 women, numbering in all 1,627 souls. The annual production in this province exceeds 10,500,000 kilograms, worth about $810,000.

DISTILLERIES.

There are 24 spirit distilleries using 50 stills and giving employment to 129 men and 5 women.

MANUFACTURES.

Silk.—Raising cocoons is not carried on to any extent, the whole amount not equaling 36,000 kilograms annually. Reeling silk from cocoons was at one time a flourishing business, but has now dwindled down to employing only 36 women, who work 45 days in the year.

Wool.—This has been a flourishing industry from ancient times. The communes of Pellezzano and Baronissi have no other manufactures; in the first there are 11 mills which spin and weave wool, in the second 8, and 2 others are at Vietri and Giffoni. The most important makes heavy cloth for mantles, tricots, pilot cloth, and military stuffs, thus giving work to 250 men, 20 boys, 125 women, and 4 girls. A 60-horse-power steam engine furnishes the motive power, and there are 960 spindles and 48 looms. In all 2,244 work people work 299 days per year in these industries.

Cotton-weaving.—There are 19 mills working 81 mechanical looms and 885 hand looms, giving occupation to 1,259 work people, of whom 27 only are men, who are busy on an average 266 days in the year.

Cotton spinning and weaving.—There is a large mill of this character at Pellezzano which employs 907 work people and works 29,000 spindles and 400 looms. Two 300-horse-power steam engines, fed by 6 boilers, furnish the motive power. They also dye and bleach cotton. The same firm works a similar mill at Angri, where 900 hands are employed, who work 650 mechanical looms and 5,000 spindles that are run by 250-horse-power engines, fed by 5 boilers. The products are domestic shirtings and calicoes for printing by the owners' works. Another mill has a 16-horse-power steam engine, 14 looms, 480 spindles at work, 240 idle, and employs 111 men. The following table shows the number of factories, situation, and number of persons, etc., employed in this trade:

Location.	Factories.	Power.				Number of spindles.	
		Steam.		Water.			
		Number.	Horse power.	Number.	Horse power.	Active.	Idle.
Baronissi	8	2	32	2	12	1,660	1,200
Giffoni Sei Casali	1	....	....	1	12	240	....
Pellezzano	11	6	127	6	83	3,840	1,260
Vietri sul Mare	1	....	....	1	10	240	240
Total	21	8	159	10	117	5,980	2,700

Location.	Number of looms.		Work people.		Average number of working days per year.
	Mechanical.	Hand.	Male.	Female.	
Baronissi	....	45	139	89	251
Giffoni Sei Casali	1	5	13	4	280
Pellezzano	....	108	586	275	278
Vietri sul Mare	....	15	42	13	260
Total	1	173	780	381	....

Woolen blankets.—This was once a flourishing industry, employing in one commune over 1,000 of the 3,500 inhabitants, but now in the whole province only 121 people work at this trade in a primitive fashion.

Cotton thread.—This is the leading industry of the province. There are 26 factories—4 spinning cotton, 19 weaving cloth, and 3 doing both. A

Swiss firm has two mills at Salerno and one at Nocera. The last has 8 boilers of 800-horse power furnishing steam to 2 engines, which operate 54,400 spindles. Nine hundred and fifty work people earn their living here, working 300 days in the year. The factory is lighted by gas. At Salerno both establishments are illuminated by electricity. Of these two mills, one has a 300-horse-power steam engine and a hydraulic motor of 80-horse power, which furnish the power for 16,838 spindles that are tended by 362 men, 28 boys, 348 women, and 50 girls. The other's motive power is a 210-horse-power steam engine and a hydraulic motor of 40-horse power, which work 17,888 spindles, and these require 216 men, 19 boys, 171 women, and 31 girls, who often work at night. The products are exported, besides serving for Italy. The thread manufactured is medium 24 and 13 English standard. There are several less important mills at Sorrento. There is a mill at Scafati for the above purpose which employs 491 hands, 8,000 spindles, 195 mechanical looms, and is furnished with motive power by a 350-horse-power engine. Thread of No. 20 English measure and various common grades of cloth are manufactured here.

Cotton and linen weaving.—At Sarno there is a mill worked by a 60-horse-power engine which employs 85 hands. Shoemakers' thread is its speciality. Another at Scafati has only 60 hand looms, worked by as many women. They average 265 days' labor in the year.

HEMP AND LINEN.

Spinning.—There are 3 steam mills run by 3 engines aggregating 140-horse power, working 54,222 spindles, which are tended by 234 men, 55 boys, 519 women, and 45 girls; in all 853 hands, and they average 300 days of labor in the year.

Weaving.—There are 3 mills at Sarno which make linen for toweling, sheeting, mattresses, handkerchiefs, etc. They use 140 hand looms, 20 Jacquard, and 6 other mechanical looms, occupying in all 240 hands, who work 300 days per year.

Dyeing, bleaching, and printing works.—There are 29 of these, which employ 647 workmen. Six use steam engines and 3 water power, and they are open 289 days in the year.

TANNERIES.

The tanneries number 26, employing 91 men.

GAS WORKS.

The only towns lighted by gas are Salerno and Nocera Inferiore, which pay 33 centimes per cubic foot for public and 40 centimes per cubic foot for private consumption. Torre Annunziata, in this consular district, but not in the province of Salerno, has gas works that employ 25 men and furnish gas to 460 public and 420 private jets at the same price as in the town of Castellammare.

PAPER MILLS.

This was once a flourishing branch of manufacture in this province, but there are now only 28 mills, 21 of which are run by water power, one by steam, and the rest by hand. They make printing, writing, wrapping, wall, blotting, and rough packing papers, employing 415 hands—231 men, 37 boys, 132 women, and 15 girls.

WOOD AND FURNITURE.

Chestnut, poplar, oak, pine, etc., are the principal woods used in furniture-making, and they are made into all kinds of heavy furniture, doors, window casings, stairs, chests of drawers, etc., in which 172 workmen are employed.

CONCLUSION.

By the figures above quoted in detail, it will be noticed that the total number of work people engaged in industrial pursuits is 15,855, divided thus:

Mineral, mechanical, and chemical	2,253
Alimentary products	3,406
Weaving and spinning industries	9,183
Miscellaneous industries	1,013

In presenting this report on Castellammare and Salerno, I give information as yet unpublished.

HENRY G. HUNTINGTON,
Commercial Agent.

CASTELLAMMARE, *December 27, 1893.*

EXPORT OF DYEWOODS TO THE UNITED STATES.

Consular officers of the United States in Haiti, Mexico, Colombia, Jamaica, Honduras, British Honduras, Brazil, Cuba, British Guiana, and Costa Rica were requested on December 20, 1893, to report upon the dyewood industry of their respective districts. Reports from the following countries are now published: (1) Haiti, (2) Mexico, (3) Colombia, (4) Jamaica.

HAITI.

In compliance with circular of December 20, 1893, concerning the export of logwood from this district, I have the honor to report that for several years Cape Haitien exported more logwood than any other port in the world. The exports for the year 1880 were 126,500,000 pounds; 1881, 157,322,650 pounds; and 1882, 132,812,372 pounds.

The maximum was reached in 1881, while the minimum in 1892 only amounted to 39,766,320 pounds.

The following statement shows the quantity and value of the logwood and the countries whither exported during ten years ending June 30, 1892:

Haiti's exportation of logwood for ten years.

Year ending June 30—	England, France, Germany, Russia, and Falmouth for orders.		United States.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Pounds.		*Pounds.*		*Pounds.*	
1883	111,116,762	$1,457,094.99	41,271,951	$541,694.35	152,288,713	$1,998,789.34
1884	115,519,137	1,516,188.67	39,256,750	515,244.84	154,775,887	2,031,433.51
1885	115,516,059	1,516,148.27	27,470,195	360,546.31	142,986,254	1,876,694.58
1886	97,776,096	1,283,311.26	16,565,340	217,420.00	114,341,436	1,500,731.26
1887	92,902,490	1,219,345.18	12,097,575	158,780.67	105,000,065	1,378,125.85
1888	97,259,949	1,276,536.84	8,903,785	116,862.18	106,163,734	1,393,399.02
1889	45,917,156	602,662.67	11,104,275	145,743.61	57,021,431	748,406.28
1890	61,975,281	813,425.56	8,825,960	115,840.73	70,801,241	929,266.29
1891	40,692,498	534,089.04	16,051,393	210,674.53	56,743,891	744,763.57
1892	32,536,570	427,042.48	7,229,750	94,890.47	39,766,320	521,932.95
Total	811,111,998	10,645,844.96	188,776,974	2,477,697.69	999,888,972	13,123,542.65

It will be seen that a notable decrease has taken place in the exportation of logwood.

The forests which produce these trees in the vicinity of roads that are available for transporting the logwood to the seaport are being rapidly denuded and partially destroyed. So eager are the people to sell their logwood that they allow no time for the stumps and roots to mature, which is from eight to twelve years, but cut down the sprouts and the saplings, because they can find speculators to purchase them. Should affairs continue in this state, Haiti will cease in fifteen years to count logwood among her exports.

There still exists throughout this country an immense quantity of logwood, there being numerous virgin forests of this dyewood; but as they are far from the public roads, it can not be transported to a distant market. As railroads will shortly be built, concessions having already been granted to several individuals, who, according to contract, are obliged to commence work this year and complete it within a specified period, this logwood can then be conveyed to the seaport, and its exportation vastly increased.

Should the people, while occupying new fields, allow the old roots and stumps to grow to maturity, then Haiti will be able to furnish to the industrial world as much logwood in the future as she has in the past.

STANISLAS GOUTIER,
Consul.

CAPE HAITIEN, *January 15, 1894.*

MEXICO.*

Nature has supplied Mexico with an abundance of woods. Many pages would be required to describe all the varieties. Those that have been known and are already utilized embrace a list of four hundred. Fifteen of these are used for dyestuffs. One tree, called purplewood, in its natural state is as brilliant as the famous Tyrian dye. The wood looks as if it had been dyed with perfect material, yet that is the way it grows. Another, the species known as "Palo-Moral," is also very valuable for dyeing fast colors. It is found in considerable quantities in the States of Tamaulipas and Nuevo Leon. However, the principal and best known dyewoods are campeachy (logwood), Brazil wood, and fustic (*palo-amarillo*). The dyewoods exist mainly and extensively in the States of Campeachy, Veracruz, Tabasco, Yucatan, Chiapas, Oaxaca, Guerrero, and Tamaulipas. In the States of Sinaloa, Jalisco, Colima, Nuevo Leon, and Michoacan there is quite an abundance, but the forests have not as yet been much explored. We can thus infer that dyewoods grow in profusion along the coast of the Republic and sparingly in the interior.

The business of collecting and exporting these woods is very lucrative. Several German and a few English firms have been in the business for a number of years in the States of Campeachy, Yucatan, Tabasco, and Veracruz and have made considerable money. The Germans and French were the first to develop the business of exporting these woods, but England for the last few years has almost monopolized it. The principal markets are England, Germany, the United States, France, Spain, and Russia (recently).

As the exportations to the United States are on the decrease, and very few Americans are engaged in the exportation of these woods, it is to be asserted that this industry, in connection with the choice cabinet woods so profusely growing in the above States, together with some of the present facilities for transportation, offers exceptional inducements for the employment of American capital and enterprise.

The wood commonly known as "palo-moral" or "palo-amarillo" is very important on account of its abundance and the facilities for obtaining it. It abounds along the Gulf coast, Guerrero, and Michoacan; but that which is produced in Isla del Carmen (island of Carmen), Tamaulipas (Tampico), and Veracruz (Tuxpan) is more valuable, having a greater proportion of dyeing qualities. It is exploited like campeachy and Brazil woods. Different sized logs are cut and the bark is separated before both (the bark and wood) are disposed of for market. Its coloring matter in the Mexican market is utilized principally for staining cotton, silk, and more particularly wool with a beautiful yellow. In combination with campeachy, indigo, and salts of cop-

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*Mr. Reuben D. George, vice-consul at Nogales, Mexico, reports that no dyewoods are exported from his district, and Mr. Theodore Huston, consul at Paso del Norte, writes that there are no forests in his district from which dyewoods are produced.

	ue.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
C		*Kilograms.*		*Kilograms.*		*Kilograms.*	
C	....	....	....	....	....	....	....
F	....	....	....	....	....	....	....
Is	....	117,500	$1,675	....	....	40,000	$100
M	....	....	....	637,627	$7,992	....	....
P	....	....	....	....	....	....	....
S	....	....	....	....	....	....	....
T	,800	1,097,840	12,700	229,204	5,000	550,226	8,400
T	.739	4,332,551	71,468	2,870,450	41,030	2,115,470	27,113
V	,486	349,600	14,695	1,191,690	25,804	17,000	300
	,927	4,903,743	98,108	2,765,129	39,805	3,271,562	60,675
	,952	10,801,234	198,646	7,694,100	119,631	5,994,258	96,588

1890–'91.		1891–'92.	
ity.	Value.	Quantity.	Value.
ams.		*Kilograms.*	
......	....	....	....
,872	$16,228	497,415	$5,000
,325	25,550	392,865	4,948
,970	13,312	....	....
,517	8,249	835,669	11,835
......	....	....	....
,416	56,292	4,268,309	74,805
.100	119,631	5,994,258	96,588

per and iron, various other colors are produced. For many years it has been exported to Germany, France, and England, its exportation running as high as 9,000,000 kilograms* a year.

Although the forests of these and other woods cover almost all the coasts of the Republic and are still very extensive, it has been thought that the random and careless manner of cutting down the trees would, in time, destroy them; hence the department of encouragement has issued a circular to prevent the destruction of this immense source of wealth. The Government also, with the same object, has placed an export duty on cabinet and construction woods of $1.50 per cubic meter and on campeachy of $1.50 and palo-moral of 75 cents per ton of 1,000 kilograms. But it is the opinion of Mr. I. Glezias, in the Department of Fomento, that, notwithstanding the wanton manner of the natives in cutting the trees, this Mexican resource is almost inexhaustible. Vegetation is so prolific along the coast and tropical section of the country that cutting trees and clearing the ground stimulates the growth of its products, and immediately after trees are felled a new supply of young trees is ready to substitute them.

The following table gives rates of exchange between Mexico and various countries:

Rates of exchange.

Year.	England.	France.	Germany.	Spain.	United States.
	Pence.	*Francs.*	*Marks.*	*Per cent.**	*Per cent.**
1883	42⅛	4.21¾	3.49	12	14¼
1884	42 3/16	4.27	3.48	12	14¼
1885	41¾	4.25	3.47	16	18
1886	39⅞	4.21	3.42	20	22
1887	37⅝	3.87	3.15	30	32
1888	35⅝	3.70	3.00	35	38½
1889	37⅝	3.87	3.15	30	32
1890	40¾	4.22½	3.45	20	22½
1891	36½	3.80	3.08	23	36
1892	31¾	3.30	2.66	32	54¾
1893 (December)	27⅜	2.83	2.30	43	80

* Premium.

During the year 1893 exchange averaged 62 per cent, and only reached 80 per cent the latter part of December.

THO. T. CRITTENDEN,
Consul-General.

MEXICO, *January 10, 1894.*

Logwood, or Brazil wood, is found to some extent within this consular district, but for some years back its exportation has not received any attention. Some ten years ago several cargoes were shipped to Europe, but unfortunately arrived when the orchilla weed (which is also extensively produced here) was in great demand, and the consequence was that the logwood did not even realize enough to pay the freight. Since then no notice has been taken of this article.

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*1 kilogram=about 2¼ pounds.

Among the various species of vegetation producing dye in this region there are two specimens worthy of investigation. These are some medium-sized trees known as "lomboy" and "torote." The bark of the former produces, in its crude state, a very deep red and indelible color, and the latter a maroon color. The lomboy, so far as known, has not as yet been analyzed or subjected to any chemical experiments, but no doubt it would prove of value. As to the destruction of the forests, it is a noticeable fact that when the bark is removed from these trees, if a little care is taken not to remove it completely, leaving a strip of 1 or 2 inches wide, the tree will surely survive, and within a year or so the bark will grow again to nearly its former normal thickness.

JAS. VIOSCA,
Consul.

LA PAZ, *January 20, 1894.*

COLOMBIA.

The records of this consulate-general—complete for over forty years—do not contain notice of a single invoice of fustic, logwood, or divi-divi; it follows that none was shipped to the United States. There are great quantities of fustic timber here and some divi-divi. No logwood has as yet been discovered, although it is probable that the tree will be found in the yet unexplored timbered wilderness and vastness of the department of Panama. No fustic is sent to the United States from this port, because the rates over the Panama Railroad from this place to Colon do not justify it.

Fustic is cut in short pieces, which, as a rule, are very crooked, thus making close packing an utter impossibility. The shipper would have to pay for 2 or 3 tons (space) when in reality he would send only one in weight.

The dyewood history is, so far as this place is concerned, just about one year old, and there are no official statistics in regard to it. However, the information I have gathered is *quasi* official, since I have it from the one solitary shipper of fustic from this place.

All the fustic is cut on Government lands, hence the material costs nothing. How long the Government will allow the promiscuous and free cutting no one can tell. The labor is exceedingly cheap, and it is safe to say that one ton of fustic ready to be put on board ship does not cost $5. Of course, there are no sawmills; the trees are cut along waterways and floated down in the log to a place handy for shipment aboard ship or train and there it is cut into suitable lengths.

The price of fustic is so very low in the United States that it is shipped to Liverpool and Havre by way of Cape Horn on vessels flying anything but the American flag. The ports on the Pacific coast, all the way from San

José de Guatemala to the Horn, have vessels of European nationalites in their harbors, but no American vessels. Those vessels come loaded down to the gunwales with goods and return with all they can pick up, and this is the way the fustic leaves the department of Panama on the Pacific coast.

Last year the one solitary shipper of fustic sent to Liverpool and Havre 280 tons of 2,000 pounds. This year he will send less, because the prices are down in Liverpool—one-half of what they were last year. From £6 per ton it has gone down to £2½. In Havre it is worth 8.75 francs per 200 pounds—somewhat higher than in Liverpool.

The price of the freight from here to the places where the dye is used seems to be the main factor in the matter of value. Can not some of our chemists devise means by which the extract of fustic—the stuff needed for dyeing—might be separated from the wood at the place where the dyewood grows, thus doing away with the main factor of value?

The other one point of interest in the history of fustic is, how long will the fustic forests last?

I am unable to be precise in this matter, and will have to make a comparison. For instance, I see by the records of this consulate that the first invoice of timber (cocobolo and mahogany) was sent to New York on October 15, 1859. Three hundred and twenty-one tons were sent on that invoice at $40 per ton, and ever since cocobolo and mahogany have been sent to the United States and Europe, the United States being by far the smallest importer. Yet during the last ten years the mahogany and cocobolo sent to New York is by the invoice book valued at $211,000. This, as stated above, is a very small fraction of the woods sent. Yet I am told that, notwithstanding the large quantity of these timbers cut, no impression at all is made on the whole.

For nearly forty years these timbers have been felled, and yet no impression on the bulk; then, too, these are hard timbers—the hardest kind—of very slow growth, while fustic is a soft wood, and consequently of far more rapid growth. It is perfectly safe to say that the manufacturers of textile fabrics need not be uneasy as to the supply of dyewoods.

Where I use the word dollar in this report, I mean the United States dollar. The rates of exchange at this writing are for United States money, 110; for English, 105; for French, 104—that is to say, $100 in American money is worth $210 of the local Colombian currency.

VICTOR VIFQUAIN,
Consul-General.

PANAMA, *January 24, 1894.*

Fustic, the only dyewood that grows in Colombia, is shipped hence mostly to Liverpool, Havre, and Hamburg, a small quantity only being sent to New York to be reshipped thence to the above-named ports.

The trade in this wood has grown up during the last four or five years, *i. e.*, since the suspension of the work on the Panama Canal, and as a new means of livelihood. It has progressed slowly, on account of the cheap labor now procurable, but bids fair to dwindle away in the event of the resumption of canal works here, when wages will cease to be low.

As in most Central American countries, the native laborers who work at this business are very indolent, and attack only the mere outskirts of the forest. It may therefore be easily judged that the almost inexhaustible wealth of these forests remains practically untouched. The value of fustic here runs all the way from $10 to $24 in Colombian silver per ton. It is now at the former rate, with a falling tendency. The present rates obtainable at the ports of Europe are by no means satisfactory, hence the trade begins to lag.

The annual shipment may be computed at from 4,000 to 5,000 tons per annum.

J. L. PEARCY,
Consul.

COLON, *January 19, 1894.*

JAMAICA.

LOGWOOD.

Logwood is the natural growth of the lowlands of this island, and as a dyestuff is intimately associated with the textile industries of all manufacturing countries.

During the past ten years, owing to the great demand and increase in price, the logwood industry of this island has assumed proportions of considerable magnitude, there having been exported during this period 818,358 tons, of the value of $13,172,336.13. Of this amount there were exported to the United States 138,322 tons, valued at $2,292,859.87; to the United Kingdom, 443,835 tons, of the value of $7,030,271.27; and to other countries, 236,199 tons, of the value of $3,849,204.99. The United States have largely increased their imports. For the fiscal year ending September 30, 1883, there were only 341 tons, of the value of $4,982.81, while for the past fiscal year they amounted to 21,594 tons, of the value of $380,941.96.

The price of logwood has ruled here for the past ten years from $15 to $25 per ton, and has recently risen to $27.50 per ton. On account of the high price offered an active trade has been had, not only in the straight wood, but in the roots. During this period a large quantity has been brought from the interior of the island, and since the extension of the Jamaica Railway a new source of supply has been opened up which was hitherto inaccessible. The exports of roots began about fifteen years ago, and must decrease, from the fact that they have been made up from the cuttings of one hundred years previous, when only the trunk or straight wood was in demand and exported.

In regard to the future of the straight wood, or logwood proper, there is very little probability of the supply being decreased. It will continue for many years to come if the present prices prevail, owing to the care now being bestowed upon the cultivation of the wood. When the old roots—the remnants of cuttings of straight wood of former years—are practically exhausted, the relative quantity of straight wood and roots will probably remain constant in the future. The relatively large shipments of the first few years after they came into use were due to the fact that large quantities were in the ground, having been left there as of no commercial value. The old roots of trees, cut fifteen or more years ago, are now in most parts of the island practically exhausted. A logwood tree that would yield a ton of straight wood would not have over 3 or 4 cwts. of roots.

Exports of logwood from 1883 to 1893.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1883.			
United Kingdom	25,523	0	$372,623.04
United States	2,341	6	4,982.82
Dominion of Canada	2	0	29.19
Austria	963	16	14,070.99
France	363	10	5,306.94
Germany	1,762	10	25,731.62
Italy	173	5	2,529.36
Portugal	304	10	4,445.54
Russia	336	10	4,912.74
Total	29,770	7	434,632.24
1884.			
United Kingdom	40,319	18	588,650.38
United States	723	5	10,559.11
Dominion of Canada	7	0	102.20
Austria	1,352	12	19,747.28
France	306	5	4,471.10
Germany	1,698	18	24,803.08
Italy	519	15	7,588.08
Total	44,927	18	655,921.23
1885.			
United Kingdom	42,552	9	559,120.06
United States	2,810	16	36,932.67
Dominion of Canada	18	0	236.52
British West Indies	1	0	13.14
Austria	2,751	16	36,157.40
France	2,784	11	36,587.71
Germany	2,926	18	38,458.15
Holland	857	5	11,263.88
Russia	1,903	0	24,994.56
Total	56,605	15	743,774.09
1886.			
United Kingdom	39,404	1	575,279.42
United States	4,846	3	70,751.37
Dominion of Canada	41	0	598.59
Austria	1,790	19	26,146.98
France	9,565	15	139,655.17
Germany	4,028	18	58,819.92
Gibraltar	459	0	6,701.18
Holland	1,087	3	15,870.39
Italy	826	9	12,065.76
Portugal	266	1	3,884.21
Russia	311	0	4,540.45
Sweden	880	15	12,851.16
Total	63,507	4	927,164.60

Exports of logwood from 1883 to 1893—Continued.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1887.			
United Kingdom	27,453	14	$434,211.15
United States	9,084	3	143,676.06
Austria	1,727	0	27,314.45
France	5,902	16	93,359.42
Germany	9,265	15	146,548.25
Gibraltar	339	16	5,374.32
Holland	1,440	16	22,787.87
Russia	1,321	5	20,897.05
Sweden	429	1	6,785.91
Belgium	1,968	10	31,134.05
Total	58,932	16	932,088.53
1888.			
United Kingdom	48,897	0	832,850.38
United States	19,545	7	332,911.06
Austria	704	5	11,995.30
France	11,665	12	198,697.25
Germany	9,656	9	164,475.89
Gibraltar	414	15	7,064.25
Holland	2,772	0	47,214.78
Russia	5,573	4	94,926.92
Sweden	1,141	8	19,441.18
Belgium	531	6	9,049.60
Total	100,901	6	1,718,626.62
1889.			
United Kingdom	59,307	15	938,018.79
United States	27,229	3	430,659.64
Dominion of Canada	423	10	6,698.13
Austria	2,366	0	37,420.95
France	9,255	3	146,380.61
Germany	10,306	16	163,013.63
Holland	506	13	8,013.24
Italy	615	10	9,734.83
Russia	3,875	6	61,292.22
Sweden	953	16	15,085.42
Switzerland	337	10	5,337.94
Belgium	276	18	4,379.43
Total	115,454	0	1,826,034.89
1890.			
United Kingdom	29,280	12	473,792.67
United States	7,962	9	128,841.29
Austria	831	11	13,455.40
France	10,545	17	170,643.57
Germany	7,794	18	126,130.14
Gibraltar	411	12	6,660.14
Holland	343	0	5,550.14
Italy	1,039	6	16,817.02
Russia	1,269	10	20,541.91
Total	59,478	15	962,432.28
1891.			
United Kingdom	56,509	17	962,518.15
United States	21,988	13	374,527.18
Dominion of Canada	30	0	510.98
British West Indies	6	16	115.82
Austria	300	0	5,109.83
France	13,508	3	230,080.93
Germany	9,422	9	160,490.29

Exports of logwood from 1883 to 1893—Continued.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1891—Continued.			
Holland	597	0	$10,168.56
Italy	1,146	8	19,526.34
Russia	5,350	0	91,125.22
Belgium	424	0	7,221.89
Total	109,283	6	1,861,395.12
1892.			
United Kingdom	37,143	0	632,647.44
United States	22,197	1	378,076.81
Dominion of Canada	107	8	1,829.32
Austria	3,393	3	57,794.67
France	12,752	16	217,215.25
Germany	5,310	7	90,449.85
Holland	1,134	9	19,809.46
Italy	461	10	7,860.61
Russia	3,311	13	56,406.51
Sweden	204	0	3,474.69
Belgium	660	0	10,754.96
Total	86,675	7	1,476,319.57
1893.			
United Kingdom	37,444	9	660,559.89
United States	21,594	1	380,941.97
Dominion of Canada	55	0	970.27
Austria	884	16	15,608.81
France	11,664	3	205,767.98
Germany	9,482	5	167,276.95
Holland	1,645	3	29,022.17
Italy	1,953	12	34,463.58
Russia	5,712	12	100,776.33
Sweden	676	16	11,939.47
Belgium	1,508	19	26,619.54
Total	92,621	16	1,633,946.96

FUSTIC.

Fustic is a mountainous wood, and therefore more difficult of transportation than logwood. The exportation of fustic from this island for the past ten years amounted to 23,818 tons, of the value of $345,592.25. Of this amount the United States took 3,133 tons, of the value of $45,266.58; the United Kingdom, 15,690 tons, valued at $224,656.80; and other countries 4,994 tons, of the value of $75,668.84. In 1883 the United States imported 133 tons, of the value of $1,954.87; the past fiscal year 841 tons, of the value of $13,316.39.

The price has ruled for the last ten years from $12.50 to $15 per ton. It costs as much to market it as logwood, and there is now more than $10 difference in the prices of the two woods. There seems to be but little demand here for fustic, and the price is so low that but little interest is manifested in this industry.

There is no likelihood that the forests producing this wood will be destroyed, and exporters for years to come will be able to fill any reasonable demand that is made for it.

Exports of Justic from 1883 to 1893.

Countries.	Quantity.		Value
	Tons	*Cwts.*	
1883.			
United Kingdom	3,064	14	$44,743.89
United States	133	18	1,954.87
Austria	108	4	1,579.66
Germany	31	10	459.89
Total	3,338	6	48,738.31
1884.			
United Kingdom	1,620	16	19,962.38
United States	14	0	170.34
Austria	27	0	328.49
Germany	114	15	1,396.06
Total	1,796	11	21,857.27
1885.			
United Kingdom	846	0	11,939.47
United States	81	10	1,150.19
Austria		5	3.53
Total	927	15	13,093.19
1886.			
United Kingdom	896	9	11,997.07
United States	675	0	9,033.44
France	2	0	26.76
Gibraltar	1	0	13.38
Total	1,574	9	21,070.65
1887.			
United Kingdom	2,311	1	33,740.17
United States	124	8	1,816.18
Austria	194	15	2,843.24
France	242	15	3,544.02
Germany	965	11	14,089.25
Holland	26	5	383.24
Russia	211	0	3,080.50
Belgium	106	0	1,547.55
Total	4,181	5	61,044.15
1888.			
United Kingdom	1,916	0	27,972.64
United States	321	10	4,693.74
Austria	69	0	1,007.37
France	3	16	55.48
Germany	153	2	2,235.17
Total	2,463	8	35,964.40
1889.			
United Kingdom	543	15	7,144.63
United States	206	10	2,713.32
Austria	43	3	566.96
Total	793	8	10,424.91
1890.			
United Kingdom	549	15	7,223.46
United States	104	15	1,376.37
France	0	10	6.57
Total	655	0	8,606.40

Exports of fustic from 1883 to 1893—Continued.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1891.			
United Kingdom	817	14	$10,943.17
United States	132	7	1,771.22
Total	950	1	12,714.39
1892.			
United Kingdom	87	10	1,277.46
United States	498	0	7,270.55
Austria	91	16	1,340.23
Total	677	6	9,888.24
1893.			
United Kingdom	3,016	14	47,712.49
United States	841	19	13,316.39
Austria	31	10	498.20
France	2,242	15	35,471.60
Germany	164	5	2,597.80
Italy	28	5	446.80
Russia	135	15	2,147.06
Total	6,461	3	102,190.34

GREEN-HEART EBONY.

Green-heart ebony is also a dyewood which grows upon this island. There has been but little demand for it, the total exports for the last ten years amounting to only 2,818 tons, of the value of $33,022.93. During this period the United States took 331 tons, of the value of $4,435.77; the United Kingdom, 2,408 tons, of the value of $25,239.65; and other countries, 79 tons, of the value of $347.51.

There is so little demand made for this wood that there is no probability that the forests producing it will be destroyed for years to come.

Exports of green-heart ebony from 1883 to 1893.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1883.			
United Kingdom	219	14	$2,672.92
United States	14	10	176.41
France	10	0	121.66
Germany	30	5	368.02
Total	274	9	3,339.01
1884.			
United Kingdom	192	10	2,341.99
United States	14	0	170.33
Austria	5	5	63.87
Total	211	15	2,576.19
1885.			
United Kingdom	492	4	7,185.87
United States	54	10	795.67
Total	546	14	7,981.54

Exports of green-heart ebony from 1883 to 1893—Continued.

Countries.	Quantity.		Value.
	Tons.	*Cwts.*	
1886.			
United Kingdom	220	4	$2,946.90
United States	24	5	324.53
France	15	15	210.78
Total	260	4	3,482.21
1887.			
United Kingdom	36	5	441.03
United States	10	0	121.66
Total	46	5	562.69
1888.			
United Kingdom	50	5	611.35
United States	7	0	85.16
Total	57	5	696.51
1889.			
United Kingdom	305	7	3,714.96
United States	76	10	930.73
Russia	0	15	4.26
Sweden	0	10	6.08
Total	383	2	4,656.03
1890.			
United Kingdom	131	18	1,604.73
United States	18	19	230.54
Total	150	17	1,835.27
1891.			
United Kingdom	384	6	5,143.04
United States	112	9	1,504.90
France	3	8	45.49
Total	500	3	6,693.43
1892.			
United Kingdom	241	19	2,943.62
United States	(*)		155.49
Dominion of Canada	(†)		17.03
Total	241	19	3,116.14
1893.			
United Kingdom	134	4	1,306.16
France	12	0	116.79
Total	146	4	1,422.95

*213 pieces. †20 pieces.

CONCLUSION.

There is in process of erection at Spanish Town, in this island, a plant for the extraction of dye from these woods; but it is not believed that, even if successfully operated, it will diminish the exportation of the dyewoods.

Q. O. ECKFORD,
Consul.

KINGSTON, *January, 1894.*

LACE TRADE OF NOTTINGHAM.

MOSQUITO NETS.

These are a staple article, and are shipped by manufacturers here to every country in the world. They are made by very cheap labor, from the fact that the machines by which the fabric is produced are so perfected that skilled labor is not required in their manufacture. Children ten years of age produce them.

There are only three machines in the United States that manufacture them, so far as I can ascertain. They are in use in New York and Paterson, N. J.

Mosquito nets may be regarded as almost a necessity.

CURTAINS.

These were formerly largely exported to the United States; but the duties under the McKinley tariff, especially as applied to the low-class goods, have materially reduced their sales there. The better and more expensive curtains are, however, sold to America in about the same quantities as formerly.

SILK LACES.

While a moderate quantity of these goods is being regularly shipped to the United States from Nottingham, a far greater proportion is sent from Calais, which is the largest manufacturing center of the silk-lace industry in the world.

The duty levied on these goods is enormous, when we consider that so few machines make them in the United States. The capacity of these machines is not equal to the one-hundredth part of the annual requirements in our country.

There is very little probability of any material increase in the output of this product in the United States for many years to come, for the reason that high-class skilled labor is required to produce them, and it is almost impossible to attract this kind of labor from its natural home.

The few goods of this character now manufactured in the United States are quite inferior to either the French or English, and are consequently sold in our markets at a very much less price.

FINE-CLASS COTTON LACES.

Laces such as "point de Irlande," "point de Venise," etc., are not made in the United States; neither are "crochet warps," "imitation Swiss embroideries," "everlasting edgings," etc. These goods have heretofore been supplied by American merchants to peddlers, but the McKinley bill has almost stopped their shipment to America.

Before the McKinley tariff there had been a steady, regular trade from this country to America in "silk malines," "silk cambrays," "wash blondes" (cotton), black and white bobbinets (cotton), fancy nets, and black and white "cotton malines," all of which goods are used solely for manufacturing purposes—making foundation for ladies' bonnets, lining for men's hats, and a variety of other purposes—the demand varying more or less in accordance with the requirements of fashion. None of these are made in the United States, and if the tariff would permit their importation a large increase in revenue would be derived and an increase in home products would follow.

VEILINGS.

These might be classified with the silk nets above mentioned, and are made with selvages into, say, 9, 12, and 14 inches. Others are made without selvages, so that they may be cut to any width. This also applies to the cotton and silk nets above referred to.

A. D. DICKINSON,
Consul.

NOTTINGHAM, *January 17, 1894.*

TIN PLATE, COAL, IRON, AND STEEL EXPORTS.

I transmit an abstract from the report of the Board of Trade showing the quantity and value of tin plates exported from Great Britain to other countries during the month of December and year ending 31st of December, 1893, compared with the corresponding month and years of 1891 and 1892; also statistics of coal, iron and steel, coke, and patent fuel exported during the same period.

Quantity and value of tin plates exported.

To—	Quantity.					
	Month ending December 31—			Year ending December 31—		
	1891.	1892.	1893.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*	*Tons.*
Russia	5,317	4,434	2,723	30,802	27,914	30,526
Germany	405	394	268	2,704	3,931	3,137
Holland	329	377	522	4,830	4,386	5,323
France	868	655	823	6,242	9,433	11,321
Portugal, Azores, and Madeira	418	408	256	4,618	5,183	5,861
Italy	764	448	326	8,332	6,873	4,004
Roumania	....	....	....	3,988	4,560	4,286
United States	13,536	23,417	14,031	325,143	278,477	255,583
Brazil	508	434	141	4,810	6,073	4,340
Argentine Republic	93	418	245	3,372	3,085	3,302
British East Indies	761	453	790	4,148	4,507	6,198
Australasia	1,348	734	1,012	10,497	7,927	7,704
British North America	1,727	969	1,195	19,935	14,862	16,000
Other countries	2,336	1,287	1,492	18,958	18,238	21,648
Total	28,410	34,428	23,824	448,379	395,449	379,233

Quantity and value of tin plates exported—Continued.

To—	Value.					
	Month ending December 31—			Year ending December 31—		
	1891.	1892.	1893.	1891.	1892.	1893.
Russia	£71,632	£54,333	£34,039	£456,304	£354,293	£375,507
Germany	5,991	5,264	3,477	42,693	54,768	40,630
Holland	5,132	5,359	7,242	79,749	63,994	76,390
France	12,600	9,463	10,942	101,911	135,567	151,110
Portugal, Azores, and Madeira	5,907	5,469	3,125	70,260	68,938	74,629
Italy	10,990	5,786	4,170	128,407	91,606	51,076
Roumania	....	....	....	61,233	65,489	60,331
United States	185,170	308,095	182,578	5,240,383	3,702,442	3,352,743
Brazil	7,448	5,861	1,774	80,305	83,751	57,994
Argentine Republic	1,502	6,249	3,805	56,935	45,848	44,746
British East Indies	10,596	5,493	10,472	59,610	61,241	79,829
Australasia	20,223	9,851	12,223	167,876	111,867	101,771
British North America	25,651	13,754	17,464	309,766	225,790	226,333
Other countries	35,535	17,878	20,115	311,223	264,622	299,197
Total	398,377	452,855	311,426	7,166,655	5,330,216	4,992,276

Quantity of coal, iron and steel, coke, and patent fuel exported from the four Welsh ports during the twelve months ending December 31, 1893.

Port.	Coal.	Iron and steel.	Coke.	Patent fuel.
Cardiff:	*Tons.*	*Tons.*	*Tons.*	*Tons.*
January	1,009,209	1,454	4,296	16,475
February	934,777	909	6,824	22,183
March	1,066,817	4,785	10,188	27,144
April	1,020,652	4,784	9,819	29,679
May	995,917	1,778	5,836	31,529
June	1,028,810	4,771	11,138	24,841
July	991,537	2,081	7,322	27,836
August	368,742	2,335	3,176	13,041
September	868,899	1,048	4,275	22,685
October	1,090,839	4,920	5,497	28,091
November	1,021,079	2,971	7,562	22,518
December	1,014,159	3,566	3,069	20,360
Total	11,411,427	35,402	79,002	294,382
Newport:				
January	210,532	....	687	6,837
February	210,007	1,612	37	2,666
March	241,370	2,417	155	7,125
April	240,264	469	60	3,600
May	257,875	2,438	990	4,620
June	292,902	4,162	706	1,129
July	319,666	319	897	1,320
August	108,310	1,243	187	5,528
September	223,374	1,178	60	1,081
October	304,627	1,319	136	1,380
November	289,907	2,970	238	5,304
December	275,005	....	237	5,816
Total	2,973,839	18,127	4,280	46,406

Quantity of coal, iron and steel, coke, and patent fuel exported from the four Welsh ports during the twelve months ending December 31, 1893—Continued.

Port.	Coal.	Iron and steel.	Coke.	Patent fuel.
Swansea:	*Tons*	*Tons.*	*Tons.*	*Tons.*
January	123,153	420	...	27,796
February	122,167	66	...	22,617
March	133,869	76	156	28,252
April	109,061	10	725	23,085
May	123,976	432	10¼	27,365
June	133,626	...	667	28,167
July	141,047	99	89	27,836
August	123,978	124	396	31,512
September	127,495	...	10	39,312
October	178,291	263	495	27,519
November	150,569	4	76	26,270
December	158,577	3¼	237	32,130
Total	1,625,809	1,497¼	2,861¾	341,881
Llanelly:				
January	12,690	...	...	...
February	14,864	...	...	...
March	11,366	...	...	...
April	14,009	...	...	...
May	15,225	...	...	...
June	15,683	8	...	...
July	15,574	4	...	...
August	17,889	...	...	...
September	17,832	13½	...	...
October	18,675	...	...	...
November	18,533	...	...	...
December	14,053	...	...	...
Total	186,393	25½	...	...

Quantity of coal, iron and steel, coke, and patent fuel exported from Cardiff, Newport, Swansea, and Llanelly during the month ending December 31, 1893.

Port.	Coal.		Iron and steel.	Coke.	Patent fuel.
	Foreign.	Coastwise			
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*
Cardiff	868,643	145,506	3,566	3,069	28,360
Newport	174,091	100,004	...	287	5,816
Swansea	96,115	62,462	3¼	237	32,130
Llanelly	11,893	2,170	...	...	...
Total	1,151,562	310,142	3,569¼	3,593	66,306

Total exports of coal to foreign parts from principal ports in Great Britain during the years 1891, 1892, and 1893.

Port.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*
Alloa	303,500	306,251	286,906
Amble	237,485	179,885	202,357
Ayr	34,519	41,545	32,838
Ardrossan	30,235	60,370	114,744
Blyth	1,700,380	1,760,290	1,867,279
Borrowstoness	392,430	430,749	386,919
Bowling Bay	864	....	....
Cardiff	9,962,863	10,345,920	9,835,937
Dundee	22,123	11,019	11,663
Glasgow	672,917	785,410	659,765
Goole	598,911	534,709	329,160
Granton	125,791	102,429	88,540
Greenock	107,641	135,529	85,815
Grangemouth	1,004,984	1,105,304	991,081
Grimsby	653,698	583,792	371,213
Hull	1,032,463	876,866	388,036
Irvine	3,454	13,563	18,168
Kirkcaldy	1,304,219	1,454,455	789,133
Liverpool	555,656	421,461	224,444
Llanelly	148,490	138,086	130,807
Methil	....	....	690,646
Middlesborough	33,693	17,940	23,069
Newcastle	4,467,064	3,836,278	4,064,544
North Shields	370,891	354,372	487,943
Newport	1,794,083	1,826,544	1,869,932
Port Glasgow	11,702	5,070	7,545
South Shields	597,242	547,889	490,091
Seaham	55,845	44,363	61,856
Sunderland	1,383,568	1,235,853	1,635,893
Stockton	1,250	335	566
Swansea	964,125	953,915	940,135
Troon	92,953	79,690	52,080
West Hartlepool	320,440	218,187	245,503
Whitehaven	370	317	60

ANTHONY HOWELLS,
Consul.

CARDIFF, *January 16, 1894.*

NOVA SCOTIA COAL.*

The following account of the coal trade of Nova Scotia is taken from the Halifax Herald of January 31, 1894, transmitted by Consul-General Ingraham:

Hon. Mr. Church, by command of his honor the lieutenant-governor, laid upon the table of the house the report of the department of mines for the nine months ending September 30, 1893. He said that in drafting this report it was found that no comparison could be properly made with the previous fiscal year, as it would result in comparing nine months with twelve. In regard to the coal trade, however, a comparison had been made with the nine months ending September 30, 1893, and a corresponding period of nine months ending September

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*See No. 161, p. 285.

30, 1892, which comparison showed that the product of the coal mines of the province for the nine months of 1892 was 1,447,107 tons and the product of the nine months ending September 30, 1893, was 1,682,713 tons, thus showing an excess in favor of the nine months ending September, 1893, of 235,606 tons. The total amount of coal sold during the nine months ending September 30, 1892, was 1,301,718 tons, as against 1,485,924 tons for the same period of 1893, showing an excess of sales for the nine months ending September, 1893, of 184,207 tons over the corresponding nine months of 1892. The sales of coal to the different countries was also given in this report, and showed that the proportionate purchase in the province of Nova Scotia remained about the same for the past number of years. The province consumed very nearly one-third of the total amount of coal sold, and the other two-thirds went mainly to the province of Quebec and to some slight extent to Ontario. The sales in the United States diminished. During the last fiscal year the sales in the neighboring Republic amounted to 16,019 tons, whereas there was a period when coal was free that the province sent 465,924 tons of coal to the United States. These sales of 16,019 tons for the past fiscal year to that country represented a better showing than the amount sold for the twelve months of 1892, when only about 13,000 tons were sold to the Americans. There was a tabular statement in the report showing the total amount of coal sold from 1851 to 1893, inclusive. It would be seen from an inspection of that summary that the coal trade in this country had very small beginnings, and that it assumed larger proportions this year. In 1785 there were only 1,668 tons sold. In the three years 1788, 1789, and 1790 there were 10,000 tons sold, and the sales went on increasing steadily until last year, when they reached the total of 1,485,924 tons for the nine months, which was the largest output ever made in Nova Scotia. From the year 1785 to the year 1893 there had been 36,384,075 tons of coal sold in the province. * * * He submitted the report and asked that it be referred to the committee on mines and minerals. The report was referred accordingly.

TRAMWAYS IN CAIRO.*

The Khedival Government, through the Minister of Public Works, announces an extension of six months for receiving bids for the proposed concession for constructing and operating a system of tramways in Cairo and its environs.

The project has attracted such wide notice in the United States, and so many letters have been received at this agency and consulate-general asking for information in connection therewith that I venture to suggest to the Department the propriety of announcing through the home press the change of date from February 1 to August 1, 1894.

As stated in my dispatch dated August 30, 1893, this proposed concession for the monopoly of street traction in the Egyptian capital is being carefully considered by European financiers and engineers. It is also a subject of general discussion locally, and, while some advance reasons intended to show that the enterprise could not prosper, other investigators favor the project.

FREDERIC C. PENFIELD,
Agent and Consul-General.

CAIRO, *January 5, 1894.*

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*See No. 158, p. 305.

CLERKS IN RETAIL STORES IN GERMANY.

The minutes of the last meeting (June 30–July 3) of the Commission for Labor Statistics at Berlin have recently been published. At this meeting the results of an investigation into the condition of clerks and apprentices in retail stores were given in summary. This investigation was made by sending out blank forms containing a series of questions to employers and employed, and the answers received were turned over to the royal statistical office to be worked up and tabulated. The answers returned were 8,235 in number, representing 374 places, and covering at least 10 per cent of all that class of stores and shops (exclusive of bakeries and confectioners' shops) which supply the ordinary daily wants of life. All parts of the Empire were covered in this investigation, and it is believed that the information collected fairly reflects the average conditions prevailing in the retail business of all Germany. This belief is strengthened by the fact that the answers given by the clerks themselves were in substantial agreement with those given by their employers.

The total number of persons covered by the investigation was 16,845, of whom 8,211 were males and 8,634 females. The latter figure is striking as showing how largely German women are engaged in earning their own living by daily labor.

An equally striking fact brought to light is the great length of the workday. Thus in 46.5 per cent of the stores under investigation a day's work is generally more than fourteen hours, and in 6.5 per cent more than sixteen hours. The male apprentices have the longest hours; in 33.9 per cent of the stores they worked more than fifteen and in 8 per cent more than sixteen hours. Next to these were the male clerks, who worked over fifteen hours in 25.8 per cent of the houses, or in 28.9 per cent if pauses are not deducted. In this respect the women and girls fare better, working over fifteen hours in 12.4 per cent of the concerns and over sixteen hours in only 1.5 per cent, while for apprentice girls the corresponding figures are 7 and 0.4 per cent, respectively.

The hour for closing was found to be after 9 o'clock at night in 38.8 per cent of the houses, after 10 o'clock in 3.9 per cent, while a very small number (one-fifth of one per cent) keep open till after 11 o'clock. In only a few of the houses are there fixed pauses for rest.

The apprentice period varies greatly for the two sexes. In most of the houses the period for boys is above two years, and in 40 per cent even three years; while for girls an apprenticeship lasts generally but one year, in only 25.9 per cent of the stores more than two years. In only a small proportion of the houses is the old custom of requiring the payment of apprentice money kept up, boys being required to pay in 15 per cent and girls in 11.7 per cent of them.

Board and lodging are given to boys in 65.6 per cent and to girls in 26.8 per cent of the concerns, and 45.1 per cent of all male clerks and apprentices and 34.3 per cent of the women and girls are thus boarded and lodged with their employers. In 61.4 per cent of the concerns board and lodging are given.

No attempt was made to collect any information as to the rate of wages.

WM. C. DREHER,
Consular Agent.

GUBEN, *December 22, 1893.*

AMERICAN PETROLEUM IN INDIA.

Mr. Van Leer Polk, our consul-general at Calcutta, under date of December 20, 1893, forwarded to the Department the "Review of the Trade of India in 1892-'93," and called attention to the following remarks which it contains:

Russian oil appears to be completely displacing American oil.

From—	1890-'91.	1891-'92.	1892-'93.
	Gallons.	*Gallons.*	*Gallons.*
Russia	19,843,423	28,333,635	38,086,703
United States	32,692,946	27,293,985	26,264,630

In three years the imports of petroleum from Russia have nearly doubled, while those from the United States have fallen off heavily. Apparently the time is approaching when American oil will cease to be known in India, and, indeed, it is said that an arrangement has been concluded or is under consideration by which the American producers will retire from the Asiatic market in favor of the Russian producers, the latter retiring from the European market in favor of the American producers.

The increase of this trade in India is eminently satisfactory, for it would be difficult to overrate the civilizing effect of cheap and efficient illuminants for the population. As yet, it is true, the use of this oil has hardly gone beyond the people of the larger towns, and 67,000,000 gallons give an average consumption, in a population approximating 300,000,000, of less than a quarter of a gallon per head of the population annually; but, as far as it has gone, the effects are excellent, and there is an indefinite opening for development. Undoubtedly in a few years we may very well see the trade increase tenfold, especially if the experiment of importing and transporting the oil in bulk, which is now being tried, should succeed.

Upon these remarks Mr. Polk makes the following comments:

This increase in the sale of Russian, and decrease in the sale of American, oil is due principally to the fluctuations in the gold value of the rupee, or exchange, whereby an element of uncertainty was given to all transactions requiring payment in gold and future delivery. This has injured, to a certain extent, the entire trade of India, but especially the trade in American petroleum. Russian oil can be placed here in thirty days, as against the four months and a half required to land a cargo of American oil. As the Indian merchant had to place the price of the oil in London in gold, he was perforce driven to purchasing the Russian oil, which could be delivered so much sooner, as it exposed him to much less risk arising from the appreciation or depreciation of the money in which he would have to receive the pay for his cargo when sold here. The American producers, however, have placed a competent agent here to obviate these difficulties. Their success is shown by the following facts:

For the first seven months of the financial year of 1893-'94 the importations of American oil into India amounted to 40,026,184 gallons, or nearly double the importation for the entire year 1892-'93. Russian oil shows a corresponding decrease. Judging from the shipping reports, it would appear that these conditions will be maintained throughout the year. At Calcutta alone there are reported as on the way with cargoes of American oil seventeen ships, against none reported to arrive with Russian oil. This in the face of the fact that the Russians have been pushing their trade by means of tank ships.

GERMAN EXPORT UNIONS.

The first factor in helping to secure foreign markets for German manufactures, apart from the almost absolute necessity of having such markets, is the great interest taken, even by inland cities, to secure foreign trade.

All over the Empire are societies organized to encourage colonization and export trade. These unions are active agents in helping to extend foreign markets. Their methods are simple, and thus far have been very successful. They are indorsed by the press, authorities, and people.

They project all kinds of schemes for bringing German wares to the notice of foreigners. Emigrants and Germans resident in foreign countries are enlisted in favor of German products. The Saxon Export Union has opened a permanent sample exhibit of German wares in Bulgaria. The almanacs published and circulated contain hundreds of names of German firms, with illustrations of their products. The purpose is to keep the Bulgarians posted as to Germany's ability to supply every possible need in the way of manufactures. Since its organization, in 1887, the union has spent $23,800 for traveling agents, etc. It has sent out 135,000 printed circulars and 94,000 letters of correspondence. In return it has received 7,000 sample orders, amounting to $1,071,000.

To illustrate German energy in seeking foreign trade, we have only to take Russia during the strained relations of the last nine months. In drugs, iron, machinery, leather, silk, and woolen goods Germany has beaten her last year's record by $11,424,000. This has been done during a time of business depression, when the press was pouring out complaints about the backwardness of business, the stopping of factories, etc.; at a time, too, when a tariff war was being waged between the two Empires. Especially worthy of note is the fact that Russia took from Germany during the first nine months of 1892 in machinery alone, $21,919,800 worth, against $20,801,200 during the same period in 1891. This in face of the fact that Russia's import duties on German goods have gone up 50 per cent, giving England, the United States, and Austria a tremendous advantage.

A German correspondent in St. Petersburg writes his paper in Chemnitz to tell his people how the thing has been done:

> In spite of differential duties, in spite of the activity of our rivals and competitors, Germany has sold her machinery because (1) of her credit system and (2) because her agents and exhibitors beat those of all other nations.

We are the only people that seem never to tire of giving the Russians credit. In a country poor in capital, but vast in undeveloped resources, this fact settles it. It is the weak and at the same time the strong side of our export or foreign trade. Against the millions made are millions lost. The conservative German, alongside of the cautious Frenchman and often as cautious Englishman, risks, wins, and remains in markets where his rivals offer for cash much cheaper than he can on credit. In countries like Russia credit plays as important a part as, if not a more important part than, price. Here, as elsewhere, only the rich can buy cheap.

The German possesses the faculty and power to put himself in the other man's place; to understand his conditions and circumstances; to find out, if not feel, his needs. So great is his power in this respect that he has absolutely no rival or competitor worth considering. Not only does he study the language of the people among whom he is to work, but he makes a specialty of it and of their agricultural and industrial needs. When selling needles and pins, he may be watching to see where to sell a knitting machine or a plow. Not only this, but his education fits him to tell the buyer what is best suited to certain kinds of work, especially where it is a question of introducing anything new. It is a notorious fact that the Russian farmer buys from a German in preference to an Englishman, an American, or even a Russian manufacturer. The German language, after Russian, is the most used in business circles, partly because there are so many Germans settled in Russia and partly because of proximity. Again, the German not only seeks to find out what the people want, but he sells machines and parts of machines, so that when injured or broken they may be easily and at once repaired—a very great consideration.

German agents and traveling salesmen are willing to work hard to sell small quantities. This makes them popular among the people to whom they are sent and satisfactory to their employers.

For so old a country the progress of the last twenty years seems incredible. The impulses of her unions, the energy of her agents, the patriotism of her people, the coöperation of her governments, the education furnished by her schools, the excellence of her products, the faithfulness with which orders are filled, and the wisdom with which each people's wishes are met are only a few of the many factors that make the Empire rich, prosperous, and progressive.

The nation's interest in foreign trade is intense. The newspapers teem with all kinds of information regarding it. Not a day passes that a consul could not find information valuable to our merchants and manufacturers. On my table at this moment are editorials out of the local papers covering the Empire's commerce with many foreign countries. I pick up one at random—Puerto Rico.

Puerto Rico bought last year 157 tons of linen and cotton goods, worth $38,343.35. Of this quantity England sent 64, the United States 47, Spain 24, and Germany, France, and Italy together 19 tons. Of chemicals, a very costly commodity, Germany sent 10, France 29, Spain 14, the United States 14, England 7, and Belgium 3 tons. Of paraffin and stearin, Germany sent 43, Spain 135, and England 10 tons. Of writing and printing paper, Spain sent 107, England 23, the United States 21, Germany 18, and France 12 tons. Of straw and packing paper, the United States sent 476, Spain 178, Germany 18, and England and France together 7 tons. Germany sent 100,000 cubic feet of building lumber. Spain sent almost all the shoes used—211 tons (Germany sent 10 tons). Railroad materials were taken mostly from Belgium—2,187 tons (Germany supplied only 120 and England 5 tons).

These figures, however, do not tell the whole story, for many of the articles sold under the English flag have their origin right here in Chemnitz. Everywhere, even in England, "Made in Germany" is found on crockery, hats, hardware, and a hundred articles offered for sale.

J. C. MONAGHAN,
Consul.

CHEMNITZ, *November 14, 1893.*

COTTON MILLS IN EGYPT.

The success which has attended the establishment of mills in the United States and other countries in the neighborhood of cotton fields has suggested to capitalists the practicability of trying the experiment in Egypt of fabricating the native cotton to clothe the people of the country. A company is forming with English and local capital to establish at Cairo a factory of about 18,000 ring spindles and 500 looms of the newest and most approved make, and if the venture prospers it is proposed to establish mills at Alexandria and other points.

The Cairo factory will be under English management, and will be equal in many respects, it is promised, to the most modern and best-equipped factories in England. An authorization for the undertaking has been granted by the Egyptian Government, and assurances have been given that every encouragement will be afforded the new industry.

The demand for cotton cloth in Egypt is large and constantly increasing, while Cairo is a distributing point not only for Upper and Lower Egypt, but also for the supply of cotton goods to the adjacent countries. Egyptian cotton, both brown and white, is well known to be of excellent quality and can be delivered in Cairo at a much lower price than in England; the rate of wages is also much lower. The Egyptian workmen are clever and easily taught, and the supply of suitable labor is ample.

In addition to the cost of freight and forwarding expenses on all goods coming into Egypt from Europe, there is a duty of about 8 per cent ad valorem payable on all imported goods. These charges will be saved on the homemade production, as well as the original one per cent paid on the cotton when it was shipped from Egypt. This saving, coupled with the suitability of the climate and the abundance of good labor, furnishes evidence of the practicability of the undertaking.

The site of the proposed factory is in the immediate vicinity of the Nile, whence water for all purposes will be obtained, and the river can also be used for the conveyance of coal and cotton to the mill. A railway runs near the factory, and a branch line of rails can be extended into the grounds, thus giving direct communication with all the railways in the country.

With a population of between 7,000,000 and 8,000,000 people, in a climate where garments of wool are worn but a few months in the year, the project theoretically has much to commend it; and with intelligent and prudent management this venture may be the precursor of a movement that will make the people of Egypt independent of England for their fabrics, for Manchester's looms now supply more than 90 per cent of the textiles coming into the country. The enterprise should render its projectors a fair measure of profit and at the same time give the Egyptians the advantage of a saving in the cost of their clothing, and illustrate for the benefit of other nations whether Egypt offers a medium for the profitable employment of capital in cotton-working.

FREDERIC C. PENFIELD,
Agent and Consul-General.

CAIRO, *January 8, 1894.*

CONSOLIDATED STATEMENTS OF EXPORTS.

It is the intention of the Department to publish in the CONSULAR REPORTS consolidated statements showing the exports to the United States each quarter from various countries. The following circular upon this subject, dated January 30, 1894, has been sent to all consular officers:

* * * * * * *

With a view of supplying this information in compact form, the Department has decided that the consuls-general in Canada, in Mexico, and in the various countries of Europe shall transmit as soon as possible after the end of each quarter, beginning with the June quarter, 1894, consolidated statements * * * showing the exports to the United States declared in their respective districts and in the consular districts subordinate to them.

In order that each consul-general may promptly prepare and transmit this consolidated statement, it will be necessary for each consul under his supervision to forward to the consul-general at the end of each quarter a statement showing the exports from his own consular district.

It is hoped that these statements will be received with such regularity and completeness that the Department may be justified in announcing beforehand the monthly number of the CONSULAR REPORTS in which they will appear. This journal is the vehicle of communication between consular officers and the business public of this country, and it is expected that its contributors will do all in their power to strengthen it and nothing to weaken it. As the printing by consular officers of the statements under consideration monthly, quarterly, or annually, to be distributed to writers for the press and to those engaged in commerce, detracts from the importance and usefulness of this journal, the Department considers it necessary to direct that the practice be discontinued. Advance sheets of the CONSULAR REPORTS, however, will be furnished consular officers applying for them, that they may continue to supply those interested with these statements.

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A few of these consolidated statements are printed in this number, and others will follow as fast as they can be compiled.

AUSTRIA-HUNGARY.

Exports to the United States for the first three quarters of 1893.

MARCH QUARTER.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Albumen					$3,543.27	$3,548.27
Amber					1,694.12	1,694.12
Argols	$4,092.76					4,092.76
Art, works of			$313.63		7,000.01	7,313.67
Artificial flowers		$3,872.83	1,779.13		1,673.39	7,325.35
Baskets and basket ware	444.97				15,434.40	15,879.37
Beans and lentils	329,472.64	115,550.43		$34,775.46	18,860.93	498,659.46
Bed feathers		84,695.80				84,695.80
Beer		20,886.40			81.20	20,967.60
Beet-root sugar		55,226.06			7,562.62	162,788.68
Black lead		4,899.26			1,511.76	6,411.02
Books and papers	1,835.53	3,737.52			3,592.25	9,165.30
Brushes and bristles					3,055.52	3,055.52
Buttons		28,442.88	42,701.89		47,362.90	118,507.67
Carbon lights					6,501.13	6,501.13
Carlsbad Sprudel salt		28,821.23				28,821.23
Carriages					426.30	426.30
Chenilles and embroideries		7,978.50			178.79	8,157.29
Cloth and woolen goods		8,360.01	2,043.73		24,207.21	34,610.95
Cotton goods		720.24	1,772.44		70,384.52	72,877.20
Cutlery			4,047.41		187.28	4,234.69
Cuttle bone				1,823.38		1,823.38
Dresses					777.69	777.69
Drugs and chemicals	17,401.32	12,854.48		2,328.80	13,694.16	46,278.76
Fans			1,513.92		110,437.18	111,951.10
Fruits (dried, etc.)	86,380.65	1,664.60		76,068.98	1,493.18	165,607.41
Furniture	301.19	980.55	217.21		19,144.13	20,643.08
Furs	915.33				795.96	1,711.29
Glassware	4,502.82	27,548.35	139,900.50		40,931.30	212,885.97
Gloves		65,140.89			25,698.75	90,839.64
Gum and glue	4,150.32	8,533.16		14,092.53		26,776.01
Hair:						
Animal					1,456.26	1,456.26
Human		9,961.46	309.82		40.79	10,312.07
Herbs, roots, and leaves	3,009.79			4,993.45		38,007.74
Hops and lupulin		33,002.94				33,002.94
Insect powder and flowers	134.38			16,904.90		17,039.28
Jewelry		8,835.75	135,107.52		28,143.08	172,091.35
Leather and skins	8,230.78	2,894.77		139,163.38	34,835.64	185,124.57
Leather goods		53,844.13			8,392.15	62,236.28
Linen goods			106,674.50		106,712.62	213,387.12
Machines and parts thereof					837.68	837.68
Meerschaum, crude					16,403.86	16,403.86
Metal goods		5,218.01	6,412.01		17,706.60	29,336.62
Mineral water	20,033.54					20,033.54
Mirror glass		16,098.17				16,098.17
Musical instruments		9,305.82	184.73		1,428.52	10,919.07
Oils, paints, and colors	1,201.92	570.02		89,429.65	865.69	92,067.28
Ozocerite and ceresin					7,516.38	7,516.38
Paper goods		14,257.06	339.16		302.82	14,899.04
Porcelain and pottery	2,710.68	98,243.02	30,281.75		8,336.08	139,571.53
Polishing earth				1,939.40		1,939.40

Exports to the United States for the first three quarters of 1893—Continued.

MARCH QUARTER—Continued.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Potash		$6,675.14				$6,675.14
Pulp	$13,158.72	16,084.66			$27,155.50	56,398.88
Scientific instruments					694.06	694.06
Seeds	783.69			$1,869.37		2,653.06
Shell and bone goods				1,196.23	20,542.26	21,738.54
Shoes and boots					3,662.21	3,662.21
Silks					35,821.58	35,821.58
Skeletons					482.51	482.51
Smokers' articles	81.20	402.78			23,538.77	24,022.75
Sparterie			$2,407.14		362.25	2,769.39
Stained glass					1,835.12	1,835.12
Stationery					5,447.59	5,447.59
Tallow, pressed					9,199.52	9,199.52
Toys		355.41	775.84		126.24	1,257.49
Umbrella fixtures	5,706.80				43,101.99	48,808.79
Velvets		401.92	920.49		274.86	1,597.27
Wax figures					1,393.19	1,393.19
White lead				2,426.41		2,426.41
Wines and liquors	16,298.96	1,062.17		3,490.44	10,613.23	31,464.80
Wooden goods					1,793.35	1,793.35
Wool	2,980.04	49,355.20			26,192.25	78,527.49
Miscellaneous	434.80	4,280.47	4,485.83	2,167.47	3,644.71	15,013.28
Total	524,262.33	910,762.09	482,188.65	392,674.90	875,105.34	3,184,993.31
Total for same quarter in 1892	53,390.55	401,653.81	304,517.15	155,412.04	502,533.81	1,417,507.36
Increase	470,871.78	509,108.28	177,671.50	237,262.86	372,571.53	1,767,485.95

JUNE QUARTER.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Albumen					5,835.31	5,835.31
Amber					4,630.92	4,630.92
Art, works of			119.10		14,634.13	14,753.23
Baskets and basket ware	397.88	419.35			11,760.74	12,577.97
Beans and lentils	22,487.60	9,803.19		1,638.76	1,840.40	35,769.95
Bed feathers		45,360.73				45,360.73
Beer		26,751.04				26,751.04
Beer-root sugar		327,554.53				327,554.53
Black lead		3,798.62			4,639.80	8,438.42
Bonnet frames			522.74			522.74
Books and papers	2,663.08	5,369.94			2,289.84	10,322.86
Brushes and bristles			175.02		4,406.76	4,581.78
Buttons		28,152.15	40,633.92		44,980.63	113,766.70
Carbon lights					6,484.71	6,484.71
Carisbad Sprudel salt		1,831.36				1,831.36
Chenilles and embroideries		3,591.93			1,078.81	4,670.74
Cloth and woolen goods		1,657.70	1,402.27	153.79	33,023.36	36,237.12
Coffee and surrogates		361.51		5,925.49		6,287.00
Cotton goods		11,897.30	732.87		74,655.18	87,285.35
Cutlery			3,566.85			3,566.85
Cuttle bone				4,862.23		4,862.23
Dresses					776.27	776.27
Drugs and chemicals	9,120.63	6,131.13		3,094.83	11,382.33	29,728.92
Fans			99.10		29,383.48	29,482.58
Felt					3,048.83	3,048.83
Fruits (dried, etc.)	18,499.55			2,834.68		21,334.23
Furniture	2,578.91				17,612.48	20,191.39

Exports to the United States for the first three quarters of 1893—Continued.

JUNE QUARTER—Continued.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Glassware	$4,945.17	$56,946.32	$197,721.61		$33,736.22	$293,349.32
Gloves		39,149.52			30,953.95	70,103.47
Gum and glue	2,810.63	3,051.17		$24,658.11		30,519.91
Hair:						
Animal	309.62				10,185.78	10,495.40
Human		11,733.03				11,733.03
Hats					1,162.21	1,162.21
Herbs, roots, and leaves	914.39			3,150.41		4,064.80
Hops and lupulin		3,910.35				3,910.35
Insect powder and flowers				28,488.81		28,488.81
Jewelry and precious stones		4,900.24	42,819.21		4,890.72	52,610.17
Leather and skins	617.57	211.12		31,467.04	10,557.76	42,853.49
Leather goods					11,022.21	11,022.21
Linen goods	398.49	52,818.55	108,715.81		54,689.08	216,621.93
Machines and parts thereof					353.32	353.32
Magnesite					9,420.95	9,420.95
Matches					1,294.66	1,294.66
Meerschaum, crude					13,035.82	13,035.82
Metal goods		3,587.61	1,805.01		26,110.06	31,502.68
Mineral water	26,090.40	809.27			742.61	27,642.28
Mirror glass		15,297.05				15,297.05
Musical instruments	45.43	10,630.79	548.11		3,102.07	14,326.40
Oils, paints, and colors			180.87	2,027.52	559.67	2,768.06
Ozocerite and ceresin					7,306.73	7,306.73
Paper goods		9,421.66	12.42			9,434.08
Polishing earth				1,938.56		1,938.56
Porcelain and pottery	2,203.99	147,258.64	42,068.63		11,716.05	203,247.31
Potash		7,541.21				7,541.21
Pulp	22,370.50	34,415.04			23,694.60	80,479.14
Scientific instruments					2,792.56	2,792.56
Seeds				1,074.75		1,074.75
Shell and bone goods					3,882.48	3,882.48
Shoes and boots					3,319.59	3,319.59
Silks and velvets		7,300.89	4,218.86		92,510.46	104,030.21
Skeletons		652.04			1,309.74	1,961.78
Smokers' articles	101.50	399.19	348.04		38,812.19	39,660.92
Soap and perfumery					1,348.82	1,348.82
Sparterie			2,009.47		426.65	2,436.12
Sponges				4,062.54		4,062.54
Stained glass					2,871.64	2,871.64
Stationery		1,276.70			2,847.97	4,124.67
Tobacco				321.12	893.34	1,214.46
Toys		9,962.76	1,830.53		981.89	12,775.18
Umbrella fixtures and sticks	2,861.22				31,957.94	34,819.16
Wax figures					2,103.89	2,103.89
Wines and liquors	10,368.53	304.60		3,214.37	13,361.77	27,249.27
Wooden ware			2,703.63		4,636.49	7,340.12
Wool		36,841.86			23,512.20	60,354.06
Miscellaneous	109.21	3,648.55	9,518.42	1,800.32	3,629.65	18,706.15
Total	129,894.30	934,748.64	461,752.49	120,713.33	758,197.72	2,405,306.48
Total for same quarter in 1892	59,369.65	552,990.57	302,616.18	112,053.95	567,769.24	1,594,799.59
Increase	70,424.65	381,758.07	159,136.31	8,659.38	190,428.48	810,506.89

Exports to the United States for the first three quarters of 1893—Continued.

SEPTEMBER QUARTER.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Albumen				$962.22	$9,478.96	$10,441.18
Amber					7,675.95	7,675.95
Art, works of	$519.68		$2,017.77		8,071.50	10,608.95
Artificial flowers		$453.44	5,431.92		1,212.32	7,097.68
Baskets and basket ware		628.42	561.22		4,894.37	6,084.01
Beans and lentils	12,608.64	12,404.92		1,466.20		26,479.76
Bed feathers		32,845.33			163.82	33,009.15
Beer		30,757.69	2,169.03		87.09	33,013.81
Beet-root sugar		1,818,719.14				1,818,719.14
Black lead		1,637.03				1,637.03
Bonnet frames			275.29			275.29
Books and papers	561.80	2,284.45			1,923.64	4,772.89
Brushes and bristles			282.10		4,168.99	4,451.09
Buttons		14,330.03	27,247.96		23,597.83	65,175.82
Carbon lights					10,436.68	10,436.68
Carlsbad Sprudel salt		2,687.67				2,687.67
Chenilles and embroideries	239.12	573.27			1,390.00	2,202.39
Cloth and woolen goods		6,333.53	1,140.18		15,521.68	22,995.39
Coffee and surrogates		228.84		181,622.93		181,851.77
Cotton goods		10,365.42			54,708.73	65,074.15
Cutlery		512.58	5,440.20			5,952.78
Cuttle bone				3,130.07		3,130.07
Dresses					501.21	501.21
Drugs and chemicals	4,305.22	3,417.01		844.70	20,134.09	28,701.02
Fans			264.09		45,786.43	46,050.52
Felt					7,647.64	7,647.64
Fruits (dried, etc.)				18,580.98	773.39	19,354.37
Furniture	1,544.73				30,230.91	31,775.64
Glassware	7,092.92	64,313.91	242,243.30		26,494.57	340,144.70
Gloves		81,595.78			20,439.08	102,034.86
Graphite					2,812.40	2,812.50
Gum and glue	1,999.42	307.35		1,348.29		3,655.06
Hair:						
Animal					2,864.82	2,864.82
Human		8,902.25				8,902.25
Hats					1,597.21	1,597.21
Herbs, roots, and leaves	7,754.78			4,774.66		12,529.44
Hops and lupulin	381.64	2,549.76			5,386.50	8,317.90
Insect powder and flowers				7,047.66		7,047.66
Jewelry		5,812.93	29,889.07		3,166.10	38,868.10
Leather and skins					3,877.50	3,877.50
Leather goods					16,084.93	16,084.93
Linen goods	60.90	44,935.52	84,968.83		81,594.99	211,560.24
Magnesite					1,223.82	1,223.82
Meerschaum, crude					5,166.37	5,166.37
Metal ware		4,879.82	5,702.42		38,263.83	48,846.07
Mineral water	31,948.22	1,729.56			97.44	33,775.22
Musical instruments		10,330.84	275.07		1,334.42	11,940.33
Oils, paints, and colors				3,118.65	1,430.38	4,549.03
Paper goods		8,893.16			1,901.54	10,794.70
Porcelain and pottery	3,439.40	179,445.52	71,557.93		25.991.19	280,434.04
Potash		5,874.26			115.22	5,989.48
Pulp	14,461.39	6,985.97			20,724.86	42,172.22
Scientific instruments					3,435.00	3,435.00
Seeds				2,234.53		2,234.53
Shell and bone ware					3,990.87	3,990.87

Exports to the United States for the first three quarters of 1893—Continued.

SEPTEMBER QUARTER—Continued.

Articles.	Buda-Pesth.	Prague.	Reichenberg.	Trieste.	Vienna.	Total.
Shoes and boots					$6,815.34	$6,815.34
Silks and velvets		$5,350.89	$2,194.78		72,873.61	80,419.28
Skeletons		273.64			408.64	682.28
Smokers' articles		349.22	550.87		31,883.19	32,783.28
Soap and perfumery			158.82		1,981.45	2,140.27
Sparterie			2,265.90		422.85	2,688.75
Sponges				$1,354.65		1,354.65
Stationery		1,175.84			109.00	1,284.84
Tobacco					281.49	281.49
Toys		4,854.18	1,990.62		2,591.04	9,435.84
Umbrella fixtures and sticks	$9,861.36		170.63		23,665.51	29,697.50
White lead				2,961.53		2,961.53
Wines and liquors	14,654.66	701.61		162.72	3,774.31	29,293.30
Wooden ware			1,634.16		11,792.44	13,426.60
Wool		2,120.40			16,064.57	18,184.97
Miscellaneous	120.12	1,729.92	2,443.88	1,626.11	3,528.58	9,448.61
Total	107,557.00	2,381,291.10	490,876.04	231,235.90	692,590.39	3,913,550.43
Total for same quarter, 1892	170,685.96	2,236,117.01	505,362.93	300,609.28	866,867.65	4,079,642.83
Increase		145,174.09				
Decrease	63,128.96		14,486.89	69,373.38	174,277.26	166,092.40

MAX JUDD,
Consul-General.

UNITED KINGDOM.

Value of exports from the various consular districts for the years ending September 30, 1892 and 1893.

Consular districts.	Quarter ending—				Total.
	December 31, 1891.	March 31, 1892.	June 30, 1892.	September 30, 1892.	
Belfast	$1,961,737.80	$2,199,030.72	$1,933,104.88	$2,682,897.45	$8,776,770.85
Birmingham	953,352.91	1,078,694.57	1,154,143.77	957,999.92	4,144,191.17
Bradford	2,911,408.52	3,015,158.38	2,999,549.13	3,980,667.19	12,906,783.22
Bristol	103,218.24	92,084.07	121,512.90	171,299.28	488,114.49
Cardiff	1,664,623.30	1,566,655.00	701,408.42	630,224.92	4,562,911.64
Cork	27,768.21	15,097.43	18,897.98	41,931.09	103,694.71
Dublin	342,016.17	202,183.02	217,976.80	343,798.51	1,105,974.50
Dundee	2,560,481.54	2,460,653.48	2,109,662.94	2,310,415.24	9,441,213.20
Dunfermline	528,516.25	531,829.41	408,236.08	645,791.67	2,114,373.41
Falmouth	28,675.34	80,012.90	40,331.55	51,090.05	200,109.84
Glasgow	1,708,604.43	1,341,702.40	1,169,719.56	1,579,377.36	5,799,403.75
Huddersfield	706,938.88	838,946.37	709,247.47	963,087.42	3,218,220.14
Hull	81,801.67	87,963.48	72,953.56	89,783.00	332,501.71
Leeds	384,902.98	376,779.80	334,995.24	348,599.29	1,445,277.31
Leith	258,003.86	202,783.94	157,005.89	233,001.07	850,794.76
Liverpool	7,022,882.13	6,928,349.96	6,653,233.60	7,656,032.05	28,260,497.74
London	14,714,167.97	11,890,882.42	12,177,652.01	13,524,874.72	52,307,577.12
Manchester	2,879,655.17	3,111,591.25	2,735,691.25	3,552,311.89	12,279,249.56
Newcastle	464,329.35	321,550.51	280,864.25	282,160.59	1,348,904.70
Nottingham	1,430,297.61	2,003,333.39	1,487,521.98	1,701,238.34	6,622,391.32

Value of exports from the various consular districts, etc.—Continued.

Consular district.	Quarter ending— December 31, 1891.	March 31, 1892.	June 30, 1892.	September 30, 1892.	Total.
Plymouth	$80,937.41	$99,443.58	$80,604.94	$147,455.34	$408,441.27
Sheffield	650,892.66	507,856.71	595,794.37	595,931.00	2,350,474.74
Southampton	13,841.99	9,052.32	12,359.65	14,753.43	50,007.39
Swansea		843,380.93	2,268,726.28	1,938,486.06	5,050,593.27
Tunstall	928,917.07	947,097.20	906,955.37	1,108,682.98	3,891,652.62
Total	42,407,971.46	40,752,113.24	39,348,149.87	45,551,889.86	168,060,124.43

Consular districts.	Quarter ending— December 31, 1892.	March 31, 1893.	June 30, 1893.	September 30, 1893.	Total.
Belfast	$2,320,094.60	$2,624,327.87	$2,035,796.85	$1,826,142.07	$8,806,361.39
Birmingham	1,119,319.53	1,145,547.03	1,037,267.63	594,229.84	3,896,364.03
Bradford	3,597,714.10	3,926,216.80	3,077,474.35	1,774,941.20	12,376,346.45
Bristol	115,049.98	132,514.37	94,062.15	69,376.80	411,003.30
Cardiff	696,720.06	1,032,260.63	974,597.66	274,780.52	2,978,268.87
Cork	69,646.94	19,506.41	28,820.81	59,314.99	177,289.15
Dublin	250,756.88	271,774.41	302,616.52	205,898.64	1,031,046.45
Dundee	2,430,686.88	3,012,864.17	2,448,413.96	1,500,318.96	9,392,283.97
Dunfermline	596,968.06	640,745.62	463,979.61	436,318.62	2,138,011.91
Falmouth	44,862.88	80,531.16	60,529.82	47,413.31	233,337.17
Glasgow	1,849,399.29	2,002,849.32	1,171,245.20	894,643.72	5,918,137.53
Huddersfield	869,066.38	911,789.84	778,141.50	628,665.05	3,187,662.77
Hull	126,449.11	115,626.79	120,853.66	44,961.33	407,895.89
Leeds	423,316.09	417,341.75	282,365.50	177,327.03	1,300,350.37
Leith	198,990.65	336,898.50	164,404.08	143,008.08	843,301.31
Liverpool	8,518,755.23	8,635,608.69	7,125,331.85	4,411,253.18	28,690,948.95
London	12,301,482.37	15,178,180.38	13,077,207.72	7,771,637.19	48,328,507.66
Manchester	3,592,403.49	3,854,984.69	3,400,733.49	2,290,705.81	13,138,827.48
Newcastle	330,004.19	429,646.56	336,824.88	213,243.89	1,310,019.52
Nottingham	1,923,195.23	2,139,278.53	1,207,294.16	976,712.35	6,246,480.27
Plymouth	82,925.00	85,093.34	92,939.72	54,040.96	314,999.02
Sheffield	710,211.24	559,909.25	561,387.74	362,806.59	2,194,314.82
Southampton	15,916.12	13,935.22	16,963.33	22,437.43	69,252.10
Swansea	1,786,185.56	1,621,839.00	2,304,896.13	1,658,995.72	7,371,916.41
Tunstall	954,718.48	1,055,179.41	1,216,919.65	796,679.68	4,023,497.22
Total	44,925,138.34	50,244,449.74	42,380,982.97	27,235,852.96	164,786,424.01

Value of articles exported from London for the years ending September 30, 1892 and 1893.

Articles.	1892.	1893.	Increase.	Decrease.	Percentage of increase.	Percentage of decrease.
					Per cent.	*Per cent.*
Animals	$504,957.98	$707,184.06	$202,226.08		40	
Antimony	204,736.46	145,591.13		$59,145.33		28 9/10
Artificial flowers	170,619.22	84,128.65		86,490.57		50 7/10
Bags and bagging	194,962.79	98,667.09		96,295.70		49 2/5
Beer, ale, and stout	812,052.06	718,008.23		94,043.83		11 3/5
Blacking	32,022.97	20,758.32		11,264.65		35 1/5
Books	2,004,520.77	2,047,276.77	42,756.00		2 1/8	
Bricks and tiles	21,086.97	10,197.95		10,889.02		51 5/8
Bristles	176,638.46	260,011.76	83,373.30		47 1/5	

Value of articles exported from London, etc.—Continued.

Articles.	1892.	1893.	Increase.	Decrease.	Percentage of increase.	Percentage of decrease.
					Per cent.	*Per cent.*
Brushes, tooth and hair	$44,813.02	$69,114.80	$24,301.78		54¼	
Burlaps	44,206.00	43,892.17		$313.83		0 5/7
Buttons	9,594.34	7,827.09		1,767.25		18 3/7
Carpets	164,218.03	184,770.96	20,552.93		12½	
Cement	1,228,479.01	1,274,696.95	46,217.94		3¾	
Chalk	68,710.70	59,839.73		8,870.97		12 9/10
China clay	2,502.95	16,485.20	13,982.25		558⅝	
Clocks and watches	43,352.38	121,924.61	78,572.23		181¼	
Coal and coke	12,825.16	3,091.18		9,733.98		75 9/10
Cocoa and chocolate	304,402.54	430,252.01	125,849.47		41⅓	
Coffee	308,848.21	867,488.99	558,640.78		180⅞	
Colors, paints, and varnishes	491,781.21	453,773.59		38,007.62		7¾
Confectionery	24,592.75	7,322.95		17,269.80		70⅕
Cotton		318.79	318.79			
Manufactures	165,221.07	235,402.20	70,181.13		42½	
Cutlery	6,137.52	14,793.37	8,655.85		141	
Cycles	71,124.68	29,453.90		41,670.78		58⅗
Drugs and chemicals	1,999,468.61	2,397,486.83	398,018.22		19 9/10	
Elastic	2,446.02	1,720.54		725.48		29⅔
Emery	19,201.30	30,282.22	11,080.92		57 7/10	
Feathers	438,897.77	412,261.27		26,636.50		6
Fish	77,021.01	31,440.99		45,580.02		59⅙
Floor cloths	109,343.31	134,778.46	25,435.15		23¼	
Fruits, nuts, and vegetables	649,270.09	704,396.28	55,126.19		8½	
Fuller's earth	71,027.69	61,375.13		9,652.56		13⅗
Furniture	146,480.47	136,990.96		9,489.51		6½
Glass, china, and earthen ware	150,579.85	192,997.50	42,417.65		28⅙	
Gloves, hosiery, etc	460,643.72	516,112.04	55,468.32		12	
Glue and gelatin	118,070.92	76,022.99		42,047.93		35⅗
Grease	25,829.57	37,924.73	12,095.16		46⅚	
Gums	341,724.99	296,533.05		45,191.94		13 2/9
Hair (cow, calf, etc.)	130,259.61	166,213.52	35,953.91		27⅗	
Hardware	35,688.13	54,711.00	19,022.87		53 3/10	
Hats and caps	118,230.52	126,243.37	8,012.85		6 7/9	
Hemp, flax, and tow	2,203,944.75	1,749,280.08		454,664.67		20⅝
Indigo	312,404.62	288,723.49		23,681.13		7⅗
Ivory	198,195.99	128,156.63		70,039.36		35⅓
Jute	36,759.60	46,371.37	9,611.77		26⅐	
Lace	12,608.35	23,782.60	11,174.25		88⅝	
Leather	624,128.46	468,991.01		155,137.45		24 6/7
Linens	122,412.10	139,721.34	17,309.24		14⅐	
Linseed		98,155.59	98,155.59			
Machinery	65,834.57	99,196.15	33,361.58		50⅔	
Matches	25,380.81	19,620.55		5,760.26		22 7/10
Metals:						
Iron and steel and manufactures	219,696.81	128,497.73		91,199.08		41½
Other	294,068.65	500,392.93	206,324.28		70⅙	
Mustard	218,118.76	211,213.40		6,905.36		3⅙
Oils	226,565.04	212,246.33		14,318.71		6⅓
Ores (iron, etc.)	14,071.97	18,988.91	4,916.94		35	
Paper and paper hangings	165,783.38	218,101.18	52,317.80		31 4/7	
Paper stock	415,940.14	549,372.51	133,432.37		32	
Perfumery	79,641.41	91,094.81	11,453.40		14⅜	
Pitch and tar	229,489.58	183,453.32		46,036.26		20

Value of articles exported from London, etc.—Continued.

Articles.	1892.	1893.	Increase.	Decrease.	Percentage of increase.	Percentage of decrease.
					Per cent.	*Per cent.*
Plumbago	$14,391.32	$11,319.64		$3,071.68		21⅓
Precious stones	3,303,379.57	2,636,132.91		667,246.66		20⅕
Preserves, pickles, etc	450,129.73	446,785.24		3,344.49		0¾
Provisions, cheese, bacon, etc	117,169.13	101,001.37		16,167.76		13⅘
Quicksilver	376,758.63	65,025.22		311,733.41		82¾
Rice	104,663.30	208,797.21	$104,133.91		99½	
Rope	3,075.63	2,084.79		990.84		32²⁄₉
Rubber:						
Raw	643,657.31	538,267.73		105,389.58		16⅜
Clothing and manufactures	98,275.11	52,127.91		46,147.20		47
Saddlery	82,517.60	85,869.50	3,351.90		4	
Salt	6,670.97	730.15		5,940.82		89
Sausage casings	128,833.65	134,370.57	5,536.92		43	
Scientific and optical instruments	97,978.13	104,634.90	6,656.77		6⅘	
Seeds, plants, etc	267,736.83	217,729.82		50,007.01		18⅔
Shellac	199,860.79	377,519.45	177,658.66		88⁹⁄₁₀	
Shells	772,575.41	599,586.53		172,988.88		22⅖
Silks	511,488.16	599,872.79	88,384.63		17²⁄₇	
Soaps	260,789.60	257,656.44		3,133.16		1⅕
Skins, furs, etc	6,014,206.49	7,054,706.15	1,040,499.66		17³⁄₁₀	
Spices	595,861.80	574,964.79		20,897.01		3½
Sponges	65,610.11	78,165.65	12,555.54		19⅐	
Stationery	165,887.38	128,729.16		37,158.22		22⅖
Sticks and canes	79,742.53	88,403.28	8,660.75		10⁶⁄₇	
Straw:						
Plait and braids	613,159.50	1,060,743.42	447,583.92		73	
Manufactures	78,160.81	76,099.59		2,061.22		2⅔
Stuff goods		218.99	218.99			
Stone (marble, granite, etc.)	44,564.27	19,856.34		24,707.93		55⁴⁄₉
Sugar	16,401.12	36,905.69	20,504.57		125	
Tea	1,285,847.17	507,877.28		777,969.89		62
Thread	180.06			180.06		100
Tin	3,319,156.44	5,114,969.43	1,795,812.99		54⅒	
Tin plates	73,527.05	383,602.59	310,075.54		421¾	
Tobacco and cigarettes	156,520.88	91,145.70		65,375.18		41⅘
Unions	21,861.46	58,490.53	36,629.07		167⁵⁄₉	
Wearing apparel	198,841.05	130,217.00		68,624.05		34½
Wines and spirits	291,750.49	285,055.67		6,694.82		2¼
Woods	297,133.63	243,994.74		53,138.89		18
Wool and camel and goat hair	5,044,429.20	3,723,938.14		1,320,491.06		26⅙
Woolen and worsted goods	2,067,867.94	1,966,615.20		101,252.74		4⁹⁄₁₀
Works of art	327,446.29	478,909.95	151,463.66		46¼	
Yarn	5,089.38	10,577.29	5,487.91		107⅘	
All other articles	6,632,745.38	1,309,685.65		5,323,059.73		80¼
Total	52,307,577.12	48,328,507.66	6,731,532.38	10,710,601.84		7⅗

SUMMARY.

Total for year ending September 30, 1892	$52,307,577.12
Total for year ending September 30, 1893	48,328,507.66
Net total decrease	3,979,069.46

Exports from United Kingdom to United States for past ten years.

Districts.	Year ending September 30—	Amount.
Belfast	1884	$6,842,100.73
	1885	7,800,096.65
	1886	8,391,933.19
	1887	8,789,274.12
	1888	9,827,165.47
	1889	9,230,991.36
	1890	9,485,669.59
	1891	8,330,463.78
	1892	8,776,770.85
	1893	8,806,361.39
	Total	86,280,827.13
Birmingham	1884	3,977,812.16
	1885	2,875,388.26
	1886	3,218,881.93
	1887	3,470,593.85
	1888	3,512,590.05
	1889	3,377,056.68
	1890	4,153,756.78
	1891	4,172,370.12
	1892	4,141,191.17
	1893	3,890,364.03
	Total	36,794,005.03
Bradford	1884	13,6[illegible]1,042.51
	1885	11,565,989.95
	1886	18,3[illegible]9,924.26
	1887	16,551,821.28
	1888	19,173,358.29
	1889	22,266,640.77
	1890	23,688,021.63
	1891	10,958,635.31
	1892	12,906,783.22
	1893	12,376,346.45
	Total	161,361,563.67
Bristol	1884	202,126.51
	1885	399,655.00
	1886	463,995.00
	1887	533,273.00
	1888	803,661.00
	1889	373,304.00
	1890	444,765.80
	1891	563,468.83
	1892	488,114.49
	1893	411,003.30
	Total	4,683,366.93
Cardiff	1884	4,373,767.29
	1885	3,785,602.65
	1886	2,378,539.83
	1887	3,758,435.38
	1888	5,400,611.49
	1889	10,490,680.32
	1890	11,157,240.35
	1891	13,748,031.31
	1892	4,562,911.64
	1893	2,978,268.87
	Total	62,634,089.13

Exports from United Kingdom to United States for past ten years—Continued.

Districts.	Year ending September 30—	Amount.
Cork	1884	$71,631.23
	1885	65,254.28
	1886	256,836.22
	1887	139,396.30
	1888	127,334.44
	1889	112,578.87
	1890	125,013.70
	1891	126,274.53
	1892	103,694.71
	1893	177,289.15
	Total	1,305,303.43
Dublin	1884	937,414.91
	1885	781,782.04
	1886	1,032,404.87
	1887	1,130,616.11
	1888	1,262,009.09
	1889	986,454.56
	1890	1,168,728.41
	1891	934,952.35
	1892	1,105,974.50
	1893	1,031,046.45
	Total	10,371,383.29
Dundee	1884	7,666,359.66
	1885	6,335,495.71
	1886	6,858,574.36
	1887	7,220,197.56
	1888	8,170,227.22
	1889	9,377,144.93
	1890	10,045,296.86
	1891	9,561,661.74
	1892	9,441,213.20
	1893	9,392,283.97
	Total	84,068,455.21
Dunfermline	1884	1,846,596.28
	1885	1,598,759.89
	1886	1,659,097.14
	1887	1,790,990.94
	1888	2,096,263.11
	1889	2,234,920.27
	1890	2,210,262.57
	1891	1,755,381.70
	1892	2,114,373.41
	1893	2,138,011.91
	Total	19,444,657.22
Falmouth	1884	104,732.18
	1885	98,655.54
	1886	59,043.13
	1887	46,103.13
	1888	77,471.67
	1889	126,114.60
	1890	138,701.76
	1891	181,929.63
	1892	200,109.84
	1893	233,337.17
	Total	1,266,198.65

Exports from United Kingdom to United States for past ten years—Continued.

Districts.	Year ending September 30—	Amount.
Glasgow	1884	$7,381,874.93
	1885	5,285,319.35
	1886	6,549,455.96
	1887	7,863,682.55
	1888	9,320,713.01
	1889	8,166,578.88
	1890	7,964,485.41
	1891	6,244,623.95
	1892	5,799,403.75
	1893	5,918,137.53
	Total	70,494,275.32
Gloucester	1884	212,375.36
	1885	154,930.79
	1886	140,753.74
	1887	(*)
	1888	(*)
	1889	(*)
	1890	(*)
	1891	(*)
	1892	(*)
	1893	(*)
	Total	508,059.89
Huddersfield	1884	(†)
	1885	(†)
	1886	(†)
	1887	(†)
	1888	(†)
	1889	(†)
	1890 (six months)	2,486,120.90
	1891	3,046,718.85
	1892	3,218,220.14
	1893	3,187,662.77
	Total	11,938,722.66
Hull	1884	459,468.67
	1885	433,112.51
	1886	249,066.87
	1887	281,673.44
	1888	410,568.37
	1889	510,816 07
	1890	680,017.93
	1891	332,699.80
	1892	332,501.71
	1893	407,895.89
	Total	4,097,821.26
Leeds	1884	5,377,193.16
	1885	3,884,045.99
	1886	5,179,506.35
	1887	5,854,348.67
	1888	5,921,449.57
	1889	6,018,425.98
	1890	4,144,232.49
	1891	1,796,186.15
	1892	1,445,277.31
	1893	1,300,350.37
	Total	40,921,016.04

*Now an agency of the Bristol consulate.

† Included in returns from Leeds consulate.

Exports from United Kingdom to United States for past ten years—Continued.

Districts.	Year ending September 30—	Amount.
Leith	1884	$993,368.76
	1885	895,903.50
	1886	843,961.62
	1887	805,151.75
	1888	1,144,151.66
	1889	1,064,708.81
	1890	1,031,857.88
	1891	686,688.97
	1892	850,794.76
	1893	843,301.31
	Total	9,160,089.02
Liverpool	1884	28,728,569.10
	1885	26,677,507.59
	1886	33,532,938.68
	1887	32,801,068.76
	1888	35,136,418.55
	1889	33,896,825.14
	1890	39,028,754.69
	1891	38,819,653.78
	1892	28,260,497.74
	1893	28,690,948.95
	Total	325,573,182.98
London	1884	46,003,504.86
	1885	37,323,547.79
	1886	51,632,923.19
	1887	55,900,183.80
	1888	50,889,914.82
	1889	47,385,928.17
	1890	56,830,421.06
	1891	49,362,976.80
	1892	52,307,577.12
	1893	48,328,507.66
	Total	495,965,485.27
Londonderry	1884	2,016.97
	1885	1,401.35
	1886	4,235.91
	1887	(*)
	1888	(*)
	1889	(*)
	1890	(*)
	1891	(*)
	1892	(*)
	1893	(*)
	Total	7,654.23
Manchester	1884	13,479,474.91
	1885	10,583,050.34
	1886	11,281,578.09
	1887	10,781,705.59
	1888	11,075,448.91
	1889	12,099,290.10
	1890	13,813,775.50
	1891	11.920,516.95
	1892	12,279,249.56
	1893	13.138,827.48
	Total	120,452,917.43

*Included in returns from Belfast consulate.

Exports from United Kingdom to United States for past ten years—Continued.

Districts.	Year ending September 30—	Amount.
Newcastle-on-Tyne	1884	$2,202,483.25
	1885	1,786,211.85
	1886	1,940,896.69
	1887	3,451,490.86
	1888	3,005,493.87
	1889	1,998,870.04
	1890	2,371,660.65
	1891	1,740,222.61
	1892	1,348,904.70
	1893	1,310,019.52
	Total	21,156,254.04
Nottingham	1884	6,536,813.48
	1885	5,288,572.34
	1886	5,731,355.84
	1887	5,862,050.70
	1888	5,660,807.50
	1889	5,784,667.42
	1890	6,961,701.49
	1891	5,511,338.61
	1892	6,622,391.32
	1893	6,246,480.27
	Total	60,206,178.97
Plymouth	1884	245,087.15
	1885	90,727.70
	1886	97,866.35
	1887	133,132.40
	1888	221,143.11
	1889	237,204.39
	1890	283,740.07
	1891	287,998.78
	1892	408,441.27
	1893	314,999.02
	Total	2,320,340.24
Sheffield	1884	3,069,771.88
	1885	2,186,745.21
	1886	2,546,092.71
	1887	4,120,579.95
	1888	3,321,586.44
	1889	2,964,488.41
	1890	3,364,415.14
	1891	2,314,160.49
	1892	2,350,474.74
	1893	2,194,314.82
	Total	28,432,629.79
Southampton	1884	148,558.88
	1885	5,974.05
	1886	6,437.48
	1887	7,371.55
	1888	14,731.96
	1889	7,046.47
	1890	7,735.32
	1891	74,618.03
	1892	50,007.39
	1893	69,252.10
	Total	391,733.23

Exports from United Kingdom to United States for past ten years—Continued.

Districts.	Year ending September 30—	Amount.
Swansea	1884	(*)
	1885	(*)
	1886	(*)
	1887	(*)
	1888	(*)
	1889	(*)
	1890	(*)
	1891	(*)
	1892 (part of year)	$5,050,593.27
	1893	7,371,916.41
	Total	12,422,509.68
Tunstall	1884	2,850,551.83
	1885	2,809,865.56
	1886	3,136,018.95
	1887	3,445,178.61
	1888	3,821,073.25
	1889	3,755,869.02
	1890	3,916,123.71
	1891	3,854,053.63
	1892	3,891,652.62
	1893	4,023,497.22
	Total	35,503,884.40

* Included in returns from Cardiff consulate.

SUMMARY.

1884	$157,314,696.65
1885	132,713,595.89
1886	165,512,318.36
1887	174,741,320.30
1888	180,344,192.85
1889	182,466,605.26
1890	205,507,499.69
1891	176,315,826.70
1892	168,060,124.43
1893	164,786,424.01
Total for 10 years ending September 30, 1893	1,707,762,604.14

Recapitulation for the ten years ending September 30, 1893.

London	$495,965,485.27	Swansea*	$12,422,509.68
Liverpool	325,571,182.98	Huddersfield†	11,938,722.66
Bradford	161,361,563.67	Dublin	10,371,383.29
Manchester	120,452,917.43	Leith	9,160,089.02
Belfast	86,280,827.13	Bristol	4,683,366.93
Dundee	84,068,455.21	Hull	4,097,821.26
Glasgow	70,494,275.32	Plymouth	2,310,340.24
Cardiff	62,634,089.13	Cork	1,305,303.43
Nottingham	60,205,178.97	Falmouth	1,266,198.65
Leeds	40,921,016.04	Gloucester‡	508,059.89
Birmingham	36,794,005.03	Southampton	391,733.23
Tunstall	35,503,884.40	Londonderry‡	7,654.23
Sheffield	28,432,629.79	Total	1,707,762,604.14
Newcastle	21,156,254.04		
Dunfermline	19,444,657.22		

*These figures represent only the declared value of exports from February 26, 1892, to September 30, 1893, Swansea having previously been an agency of the Cardiff consulate.

† These figures represent only the declared value of exports for the three years and six months ending September 30, 1893, Huddersfield having previously been an agency of the Leeds consulate.

‡ These figures represent only the declared value of exports for the three years ending September 30, 1886, those for the years 1887 to 1893 being embodied in the reports from Bristol and Belfast, of which consulates Gloucester and Londonderry are respectively agencies.

Recapitulation for the year ending September 30, 1893.

London	$48,328,507.66	Dunfermline	$2,138,011.91
Liverpool	28,690,948.95	Newcastle	1,310,019.52
Manchester	13,138,827.48	Leeds	1,300,350.37
Bradford	12,376,346.45	Dublin	1,031,046.45
Dundee	9,392,283.97	Leith	843,301.31
Belfast	8,806,361.39	Bristol	411,003.30
Swansea	7,371,916.41	Hull	407,895.89
Nottingham	6,246,480.27	Plymouth	314,999.02
Glasgow	5,918,137.53	Falmouth	233,337.17
Tunstall	4,023,497.22	Cork	177,289.15
Birmingham	3,896,364.03	Southampton	69,252.10
Huddersfield	3,187,662.77		
Cardiff	2,978,268.87	Total	164,786,424.01
Sheffield	2,194,314.82		

PATRICK COLLINS,
Consul-General.

GERMANY.

Exports for 1893 from Frankfort and its subordinate consulates.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Aix la Chapelle.				
Books, stationery, photographs, and paper ware	$51,501.34	$29,727.55	$32,788.29	$27,483.06
Buttons and button stuffs, etc	7,041.52	7,518.40	5,724.73	7,325.57
China, glass, porcelain, stone, and earthen ware				2,533.26
Dyes, drugs, chemicals, etc	44,497.61	42,626.08	44,453.64	27,065.22
Fancy goods and toys	673.99	3,519.67	4,725.84	
Glass plate, window and mirror glass	7,855.66	15,511.65	3,290.14	
Gloves	48,747.19	26,627.83	38,217.80	
Linen, woolen, and cotton goods	176,695.63	247,182.67	187,632.29	118,366.65
Machinery	3,784.20	141.78		
Mineral water	2,301.69	5,392.88	685.44	
Oil and glass paintings and chromos			476.00	
Pins and needles	21,383.94	21,859.41	7,432.26	10,717.14
Prunes, dried fruits, nuts, land produce, etc				102,837.26
Steel (manufactured) and bessemer	1,522.46	27,781.23	3,028.12	2,438.73
Sundries	538.67	254.78	847.30	3,910.44
Wine, brandy, beer, and liquors		127.84		
Wool		2,194.18		
Total from Aix la Chapelle	366,543.90	430,465.95	329,301.85	302,677.33
Total for same period in 1892	309,365.36	527,175.16	438,119.02	497,709.83
*Bamberg.**				
Baskets and basket ware	55,302.91	66,923.93	76,601.05	31,447.25
China, glass, porcelain, stone, and earthen ware	929.45	516.38	1,461.39	
Dyes, drugs, chemicals, etc	151.28	893.13		
Hops	47,814.78	11,843.46	233.32	30,779.60
Oil and glass paintings and chromos	766.12			
Prunes, dried fruits, nuts, land produce, etc	768.17	877.75	865.36	1,151.92
Sundries	533.56	894.97	621.60	1,875.83
Wine, brandy, beer, and liquors	4,269.30	3,368.06	4,096.82	3,151.18
Total from Bamberg	110,535.57	85,317.68	83,879.54	68,405.78
Total for same period in 1892	68,786.66	108,209.62	129,043.10	172,758.32

* Established March 18, 1892; formerly consular agency under Sonneberg.

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Barmen.				
Braids, bindings and trimmings, etc	$239,454.43	$206,425.43	$585,962.76	....
Books, stationery, photographs, and paper ware	....	40,789.66	....	....
Buttons and button stuffs, etc	38,601.33	....	....	....
Dyes, drugs, chemicals, etc	191,433.53	230,385.31	....	$200,000.00
Fancy goods and toys	28,811.75	27,401.27	....	....
Hatbands and ribbons	382,990.24	463,400.27	....	175,000.00
Ironware, steel, cutlery, etc	74,016.63	120,743.48	300,051.44	325,000.00
Linen, woolen, and cotton goods	307,898.81	234,827.53	373,463.45	....
Machinery	6,048.01	4,437.08	....	....
Prunes, dried fruits, nuts, land produce, etc	35,003.45	17,001.03	....	....
Pins and needles	19,338.93	21,127.97	....	....
Silk, silk goods, velvets, ribbons and braids, etc	220,824.73	204,065.76	....	....
Sundries	6,972.67	8,804.14	41,453.09	142,779.73
Total from Barmen	1,551,394.51	1,579,408.93	1,300,932.74	842,779.73
Total for same period in 1892	1,505,700.25	1,361,758.51	1,662,459.31	1,625,020.78
Cologne.				
Books, stationery, photographs, and paper ware	2,682.88	2,930.14	2,349.99	2,114.75
Caps and cartridges	3,645.43	2,466.54	....	....
China, glass, porcelain, stone, and earthen ware	14,827.43	23,030.50	33,195.99	19,313.96
Cologne water	3,660.27	2,847.46	2,519.21	2,938.40
Dyes, drugs, chemicals, etc	151,289.63	121,262.42	94,798.95	106,614.12
Ironware, steel, cutlery, etc	47,564.96	103,293.62	26,406.46	9,019.05
Leather, hides, and skins	31,731.28	40,415.61	27,139.88	13,394.53
Linen, woolen, and cotton goods	19,268.77	305.95	369.79	2,695.11
Machinery	1,251.71	....	....	....
Mineral water	86,681.77	172,803.18	103,255.23	58,510.52
Prunes, dried fruits, nuts, land produce, etc	17,582.64	23,781.22	26,065.02	34,009.86
Silk, silk goods, velvets, ribbons and braids, etc	63,103.99	41,679.54	127,452.24	23,240.90
Smokers' articles, snuff, cigars, and tobacco	2,475.22	6,498.52	4,486.84	8,127.24
Soaps and perfumery	7,820.42	2,721.04	3,165.28	2,255.45
Sundries	14,381.16	14,320.48	14,282.32	18,703.10
Steel (manufactured) and bessemer	32,044.52	81,094.76	25,662.55	9,302.09
Wine, brandy, beer, and liquors	81,889.59	86,491.69	41,517.33	48,921.35
Total from Cologne	581,901.67	725,942.67	532,667.08	359,341.33
Total for same period in 1892	581,155.14	581,239.10	677,626.59	634,199.89
Crefeld.				
Books, stationery, photographs, and paper ware	21,884.04	18,771.09	18,159.40	14,526.51
Buttons and button stuffs, etc	236.13	182.33	75.87	....
Dyes, drugs, chemicals, etc	9,823.51	11,162.03	4,524.04	2,732.23
Hatbands and ribbons	61,592.35	19,274.22	31,874.68	23,182.40
Linen, woolen, and cotton goods	3,589.60	17,406.33	22,875.78	1,474.75
Machinery	2,190.70	2,177.96	1,157.70	3,360.21
Oil and glass paintings and chromos	....	721.62	1,135.13	705.67
Silk, silk goods, velvets, ribbons and braids, etc	936,552.14	1,161,306.72	1,313,008.98	370,183.10
Soaps and perfumery	3,467.05	2,786.95	2,488.16	117.93
Sundries	....	297.92	375.13	....
Wine, brandy, beer, and liquors	4,755.52	6,930.61	4,464.88	4,464.88
Total from Crefeld	1,044,091.04	1,241,017.78	1,400,139.75	421,037.68
Total for same period in 1892	579,003.18	730,740.19	1,039,569.33	864,809.21
Dusseldorf.				
Braids, bindings and trimmings, etc	7,245.80	....	....	....
Books, stationery, photographs, and paper ware	18,626.54	11,965.67	7,111.02	6,243.42
Buttons and button stuffs, etc	556.10	....	....	....
Caps and cartridges	2,470.44	3,387.45	2,470.44	4,690.77

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Dusseldorf—Continued.				
China, glass, porcelain, stone, and earthen ware..	$30,504.34	$24,082.34	....	$1,027.25
Dyes, drugs, chemicals, etc..........................	28,391.07	26,468.11	$23,450.27	25,425.97
Fancy goods and toys..	1,591.34	1,542.10	1,588.78	643.31
Glass plate, window and mirror glass..............	....	....	15,248.28	....
Instruments..	4,496.07	3,500.26	....	140.58
Ironware, steel, cutlery, etc.............................	311,301.27	254,622.58	18,741.50	15,054.57
Linen, woolen, and cotton goods......................	41,463.05	25,025.45	25,816.44	10,473.61
Machinery..	162,027.65	95,230.89	63,622.24	49,235.87
Mineral water..	597.54	1,705.74	612.09	1,265.35
Music, musical strings, and instruments..........	....	199.30	....	....
Oil and glass paintings and chromos................	948.09	342.69	1,003.19	579.69
Prunes, dried fruits, nuts, land produce, etc......	....	....	....	715.53
Silk, silk goods, velvets, ribbons and braids, etc..	24,476.83	17,803.07	17,822.15	13,269.18
Sundries..	20,212.10	7,827.80	2,534.99	1,574.84
Wine, brandy, beer, and liquors........................	1,116.95	284.65	....	343.43
Total from Dusseldorf...........................	656,025.18	473,988.10	180,021.39	130,613.37
Total for same period in 1892..................	287,728.87	352,787.60	402,983.55	497,719.05
Erfurt.[*]				
China, glass, porcelain, stone, and earthen ware..	15,545.25	68,305.20	53,372.75	20,042.20
Dyes, drugs, chemicals, etc..........................	4,978.50	13,249.80	3,080.51	2,389.46
Fancy goods and toys..	11,907.92	89,170.03	110,795.22	14,941.51
Gloves..	3,610.03	4,072.92	5,147.07	3,737.81
Hair, prepared and raw.....................................	2,138.98	848.69	4,147.30	....
Instruments..	3,400.50	6,142.17	4,379.12	2,045.35
Ironware, steel, cutlery, etc.............................	1,298.47	1,705.52	1,256.62	2,223.85
Linen, woolen, and cotton goods......................	2,632.53	22,441.61	27,616.70	3,400.59
Seeds, plants, etc..	19,018.58	383.90	5,723.61	50,881.52
Smokers' articles, snuff, cigars, and tobacco.....	1,345.15	5,057.72	2,164.73	2,953.14
Sundries..	9,897.44	7,708.47	11,994.77	4,657.12
Wine, brandy, beer, and liquors........................	450.70	752.30	....	....
Watches, clocks, and watchmen's detectors......	2,210.75	13,193.96	10,031.32	1,383.75
Total from Erfurt..................................	78,434.80	233,032.29	239,709.72	108,656.30
Total for same period in 1892..................	....	85,336.85	262,968.40	165,055.50
Frankfort.				
Baskets and basket ware..................................	1,500.78	2,468.30	1,126.43	212.75
Brushes and hair pencils...................................	....	....	....	222.70
Books, stationery, photographs, and paper ware..	42,348.67	29,689.66	30,537.20	21,341.65
Buttons and button stuffs, etc........................	977.79	696.37	....	....
Cement...	7,663.60	19,939.27	12,431.56	1,799.28
Clay..	12,949.89	36,443.86	20,774.73	15,908.53
China, glass, porcelain, stone, and earthen ware..	5,252.61	7,520.09	12,929.24	2,771.45
Colored, photographic, and fancy paper...........	72,803.94	41,688a36	21,678.78	14,533.17
Downs and feathers..	898.19	8,692.38	1,976.59	....
Dyes, drugs, chemicals, etc..........................	394,745.70	490,927.01	195,043.91	262,351.73
Fancy goods and toys..	11,906.97	22,418.75	27,530.43	8,855.43
Hatters' fur..	26,422.83	34,535.42	5,181.26	1,412.15
Hair, prepared and raw.....................................	20,172.91	74,779.47	14,272.62	15,678.43
Hares' hair	78,449.72	58,545.79	51,270.82	35,522.56
Hops..	21,367.20	3,522.33	1,525.67	7,700.84
Instruments..	117.81	779.47	....	772.70
Ironware, steel, cutlery, etc.............................	4,864.50	2,854.04	887.14	3,052.11
Jewelry and precious stones..............................	....	....	8,994.02	....
Leather, hides, and skins..................................	238,632.52	248,753.52	54,998.03	97,908.03
Leather goods..	9,499 08	17,072.62	23,889.33	3,361.47

[*] Established May 28, 1892; previously belonged to Sonneberg district.

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Frankfort—Continued.				
Linen, woolen, and cotton goods	$44,171.95	$8,807.63	$7,863.23	$5,749.35
Machinery	3,461.36	4,329.51	3,822.46	2,363.93
Mineral water	8,970.80	38,521.08	10,170.75	20,529.00
Music, musical strings, and instruments	937.79	152.72	1,556.47	544.50
Optical goods	3,967.52	3,723 98	11,006.41	10,195.68
Oil and glass paintings and chromos	520.99	966.52	1,851.84	324.33
Platina wire and platinum	90,038.76	106,706.88	72,380.01	70,382.70
Prunes, dried fruits, nuts, land produce, etc	29,580.44	19,265.25	13,750.80	12,557.48
Seeds, plants, etc	1,379.13	675.68	2,417.66	5,035.32
Smokers' articles, snuff, cigars, and tobacco	2,432.72		2,460.36	1,702.51
Soaps and perfumery	6,944.38	1,280.32	2,588.13	3,261.89
Sundries	11,813.12	6,127.46	7,995.08	2,193.28
Steel (manufactured) and bessemer		1,341.61	6,879.73	3,154.92
Wine, brandy, beer, and liquors	28,594.07	37,555.04	17,122.30	23,504.62
Watches, clocks, and watchmen's detectors		478.31		2,242.20
Wool		13,630.92		
Total from Frankfort	1,183,387.74	1,344,892.62	646,912.99	657,206.69
Total for same period in 1892	795,413.90	928,946.35	1,084,446.87	1,202,073.51
*Freiburg.**				
Brushes and hair pencils		72.95		
Books, stationery, photographs, and paper ware	34,288.05	22,453.85	16,374.15	12,548.95
Buttons and button stuffs, etc	12,495.90	10,718.30	1,976.25	8,445.90
Cement	245.45	231.95		280.20
Dyes, drugs, chemicals, etc	31,049.15	14,516,85	12,405.45	14,441.80
Hair, prepared and raw	170.70			
Instruments	396.15			965.85
Ironware, steel, cutlery, etc	559.10	77.60		
Jewelry and precious stones			356.45	
Leather, hides, and skins	1,145.30		1,341.25	
Linen, woolen, and cotton goods	420,553.05	42,604.85	39,771.40	171,082.10
Machinery	2,107.05		19,355.90	
Music, musical strings, and instruments	5,030.25	7,057.05	9,051.05	2,322.65
Silk, silk goods, velvets, ribbons and braids, etc	38,102.65	16,069.00	13,545.10	12,364.25
Sundries	1,211.70	680.35		6,358.85
Steel (manufactured) and bessemer			3,925.35	
Wine, brandy, beer, and liquors	75.00	448.95	214.25	785.85
Watches, clocks, and watchmen's detectors	2,463.60	4,283.45	8,897.05	3,955.35
Total from Freiburg	549,893.10	119,215.15	127,213.65	233,551.75
Total for same period in 1892				459,208.20
Fürth.				
Brushes and hair pencils	1,754.13	326.31		
Bronze powder and leaf metal	101,093.30	85,583.13	71,645.20	49,909.38
Books, stationery, photographs, and paper ware	9,845.24	25,694.35	16,670.44	27,044.09
Dyes, drugs, chemicals, etc				7,739.52
Fancy goods and toys	31,135.43	156,256.47	141,441.31	12,087.27
Glass plate, window and mirror glass	316,964.91	390,532.10	122,077.81	135,163.45
Gold, silver, and metal paper	8,075.59	12,240.72	9,620.51	5,274.58
Hair, prepared and raw		2,573.55		
Hops	5,073.51			3,639.20
Instruments			8,387.19	1,592.81
Ironware, steel, cutlery, etc	2,527.75			
Leonic ware		540.95		
Linen, woolen, and cotton goods				923.80

* Established December 6, 1892; formerly consular agency under Kehl.

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Fürth—Continued.				
Optical goods	$3,963.23	$7,051.79		
Prunes, dried fruits, nuts, land produce, etc	2,383.58	5,028.84	$5,493.00	$8,810.41
Smokers' articles, snuff, cigars, and tobacco	478.22	448.78	135.65	265.17
Sundries	3,746.79	4,665.24	6,267.54	3,556.13
Wine, brandy, beer, and liquors				574.10
Total from Fürth	487,041.68	690,947.23	381,738.65	256,579.91
Total for same period in 1892	510,598.64	634,473.90	772,014.47	659,786.21
Kehl.				
Bronze powder and leaf metal			824.96	471.52
Books, stationery, photographs, and paper ware	14,161.09	11,602.87	13,205.03	6,197.39
China, glass, porcelain, stone, and earthen ware	46,250.84	43,003.31	40,150.46	29,213.70
Dyes, drugs, chemicals, etc	14,899.12	35,563.43	17,261.85	11,739.95
Fancy goods and toys		180.65		717.68
Hair, prepared and raw	12,877.69	8,887.27	10,973.55	7,168.02
Instruments			674.17	
Ironware, steel, cutlery, etc	2,027.80	1,926.30	2,951.00	
Leather, hides, and skins	80,015.96	72,441.81	41,775.78	20,900.88
Linen, woolen, and cotton goods	88,888.35	47,715.41	70,542.48	19,677.75
Music, musical strings, and instruments		292.74		285.60
Prunes, dried fruits, nuts, land produce, etc	4,233.82	3,293.96	6,660.01	21,570.94
Silk, silk goods, velvets, ribbons and braids, etc	19,730.00	10,765.24	16,754.17	24,212.53
Smokers' articles, snuff, cigars, and tobacco	1,788.76	1,280.82	1,167.23	1,138.89
Sundries	785.41	1,663.48	522.84	77.35
Steel (manufactured) and bessemer	39,759.97	31,751.38	10,803.41	
Wine, brandy, beer, and liquors	1,446.01	1,889.70	249.70	1,199.67
Watches, clocks, and watchmen's detectors	1,197.91	2,563.92	389.69	134.30
Total from Kehl	328,062.73	274,825.29	234,906.33	144,706.17
Total for same period in 1892	785,693.05	406,049.30	452,942.75	289,181.36
Mannheim.				
Books, stationery, photographs, and paper ware	2,220.62	10,596.85	1,016.72	
Cement	44,213.89	87,057.30	50,573.79	11,933.13
China, glass, porcelain, stone, and earthen ware	9,427.14		9,393.79	
Dyes, drugs, chemicals, etc	703,711.89	605,453.00	353,354.75	404,800.19
Fancy goods and toys	972.54			
Glass plate, window and mirror glass		14,370.91		
Gloves	13,691.61	4,148.28	3,825.91	
Hair, prepared and raw	6,490.73			
Hops	369.33			5,306.06
Ironware, steel, cutlery, etc	12,734.00	2,186.17		
Jewelry and precious stones	7,273.48	2,267.33	6,781.47	
Leather, hides, and skins	332,038.79	194,884.76	149,257.62	174,029.28
Leather goods	7,449.55	3,350.80		
Linen, woolen, and cotton goods	39,298.88	3,160.05		
Machinery		332.11	2,263.36	
Prunes, dried fruits, nuts, land produce, etc	595.71	1,539.21		
Sundries	14,592.58	22,047.82	18,643.76	22,791.97
Steel (manufactured) and bessemer		1,336.10		
Wine, brandy, beer, and liquors	63,220.74	74,017.52	46,017.75	70,747.36
Total from Mannheim	1,258,301.48	1,026,748.21	641,128.92	689,607.93
Total for same period in 1892	1,082,568 26	1,251,214.44	1,256,504.22	1,344,421.85
Mayence.				
Books, stationery, photographs, and paper ware		2,706.70	3,104.61	
Caps and cartridges		3,475.17		
Cement	39,886.06	82,841.49	52,837.64	51,823.43

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Mayence—Continued.				
Dyes, drugs, chemicals, etc	$139,721.10	$129,063.09	$97,331.69	$50,027.44
Hair, prepared and raw	5,069.98	3,271.98	4,476.32	6,445.54
Hops	34,431.15	....	....	78,481.50
Ironware, steel, cutlery, etc	3,669.29	....	2,467.89	....
Jewelry and precious stones	109,026.25	134,011.71	71,022.85	53,292.18
Leather, hides, and skins	21,426.99	52,170.23	25,776.60	22,709.43
Machinery	....	5,939.24	1,536.41	....
Music, musical strings, and instruments	1,029.80	....	....	....
Oil and glass paintings and chromos	3,680.19	....	6,663.83	....
Prunes, dried fruits, nuts, land produce, etc	1,397.60	....	9,952.09	9,069.28
Silks, silk goods, velvets, ribbons and braids, etc	....	1,705.50	....	....
Sundries	3,489.69	12,514.58	13,329.02	9,275.41
Steel (manufactured) and bessemer	4,944.06	3,549.61	....	....
Wine, brandy, beer, and liquors	201,787.62	302,788.32	126,744.62	194,268.92
Total from Mayence	569,559.78	734,037.62	415,243.57	472,393.19
Total for same period in 1892	448,586.66	635,535.16	577,007.48	758,307.00
Munich.				
Brushes and hair pencils	....	1,475.84	540.74	433.09
Bronze powder and leaf metal	9,380.67	905.83	....	....
Books, stationery, photographs, and paper ware	15,184.52	12,146.61	23,318.67	12,282.63
China, glass, porcelain, stone, and earthen ware	14,369.66	2,938.92	3,562.93	1,147.51
Dyes, drugs, chemicals, etc	18,465.94	21,825.55	25,228.21	1,332.34
Fancy goods and toys	2,017.82	2,657.10	9,257.32	3,792.05
Gold, silver, and metal paper	....	9,899.00	5,919.67	3,363.36
Gloves	37,634.00	23,635.92	41,186.35	18,684.56
Instruments	2,756.34	5,076.91	4,499.33	2,824.34
Ironware, steel, cutlery, etc	....	390.65	570.95	1,076.53
Jewelry and precious stones	3,208.02	....	....	....
Leather, hides, and skins	11,408.29	4,543.69	9,346.71	570.48
Linen, woolen, and cotton goods	9,906.36	5,879.59	2,293.41	5,240.72
Machinery	....	....	....	342.48
Music, musical strings, and instruments	2,059.27	2,529.53	2,561.89	1,311.65
Oil and glass paintings and chromos	21,571.08	34,705.14	39,381.45	30,612.14
Prunes, dried fruits, nuts, land produce, etc	61,933.45	1,404.20	....	4,617.20
Statuary and sculpture	5,877.00	8,404.63	10,590.78	9,626.74
Sundries	9,267.72	6,431.45	14,783.25	7,504.31
Steel (manufactured) and bessemer	....	....	4,080.59	1,838.10
Wine, brandy, beer, and liquors	9,831.23	16,081.05	9,891.16	15,330.01
Watches, clocks, and watchmen's detectors	4,737.00	2,857.32	....	....
Wool	....	2,501.56	....	....
Total from Munich	239,608.37	166,290.49	206,613.41	121,930.24
Total for same period in 1892	193,365.12	155,874.51	321,590.05	263,022.61
Nuremberg.				
Brushes and hair pencils	15,672.10	14,611.29	20,270.97	7,135.11
Bronze powder and leaf metal	59,492.72	67,107.88	74,950.33	72,286.99
Books, stationery, photographs, and paper ware	8,920.16	23,926.76	30,275.92	9,478.90
Clay	396.17	892.08	777.14	151.41
China, glass, porcelain, stone, and earthen ware	14,482.58	21,754.56	47,609.40	7,558.33
Colored, photographic, and fancy paper	4,469.68	384.92	843.95	....
Decalcomania	27,184.72	22,727.27	21,860.67	12,285.83
Dyes, drugs, chemicals, etc	13,639.42	15,582.83	10,667.79	17,885.02
Fancy goods and toys	6,613.65	15,194.20	23,237.96	4,442.31
Glass plate, window and mirror glass	687.04	495.18	....	....
Gold, silver, and metal paper	556.98	335.34	109.77	152.41

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Nuremberg—Continued.				
Gas-burners, lava gas tips, brass lamps	$5,264.75	$7,033.78	$4,353.29	$4,112.57
Hair, prepared and raw	....	....	....	7,515.07
Hops	163,822.11	21,687.41	....	96,230.06
Instruments	4,548.48	7,813 01	17,296.41	3,414.52
Ironware, steel, cutlery, etc	10,606.59	14,831.65	10,786.75	8,341.10
Leather, hides, and skins	18,461.09	3,244.90	786.05	655.11
Leonic ware	18,856.39	8,820.67	7,359.07	3,191 39
Linen, woolen, and cotton goods	1,553.67	844.53	7,874.82	2,160.42
Lithographic stones and materials	25,750.45	21,508.74	16,037.96	11,350.75
Machinery	....	....	3,311.62	3,664.74
Music, musical strings, and instruments	7,270.79	9,933.36	5,116.01	3,147.39
Optical goods	630.39	2,603.68	....	178.82
Oil and glass paintings and chromos	1,708.94	3,691.36	1,167.58	456.23
Slates and slate pencils, lead pencils	31,261.89	26,708.97	19,166.45	20,183.53
Smokers' articles, snuff, cigars, and tobacco	2,931.75	1,722.64	1,030.30	111.14
Statuary and sculpture	3,553.31	1,358.19	....	....
Sundries	2,358.35	3,312.98	6,483.49	9,688.58
Wine, brandy, beer, and liquors	5,105.56	7,355.97	10,976.02	4,159.92
Total from Nuremberg	455,802.73	325,484.15	342,359.72	309,937.65
Total for same period in 1892	421,669.83	374,821.35	355,893.89	564,527.85
Sonneberg.				
Baskets and basket ware	921.79	2,738.93	2,356.71	686.52
Books, stationery, photographs, and paper ware	6,942.57	6,771.21	13,825.95	11,990.80
China, glass, porcelain, stone, and earthen ware	109,310.96	280,192.49	361,769.01	79,555.78
Dyes, drugs, chemicals, etc	6,474.80	7,645.42	4,812.08	1,535.21
Fancy goods and toys	99,603.18	403,576.13	596,133.43	98,215.79
Gloves	4,072.55	5,127.15	7,570.29	6,024.30
Ironware, steel, cutlery, etc	7,042.14	8,483.54	7,440.48	7,251.29
Linen, woolen, and cotton goods	....	2,573.68	6,770.16	92.25
Mineral water	....	....	....	483.43
Slates and slate pencils, lead pencils	5,260.19	13,264.04	5,754.75	3,538.50
Smokers' articles, snuff, cigars, and tobacco	188.76	188.76	....	....
Sundries	4,385.82	4,023.62	2,800.43	861.57
Wine, brandy, beer, and liquors	8,577.73	8,046.67	7,835.59	7,951.55
Total from Sonneberg	252,780.49	742,631.64	1,017,068.88	218,186.99
Total for same period in 1892	529,576.62	853,812.54	994,535.32	285,053.95
Stuttgart.				
Books, stationery, photographs, and paper ware	11,920.96	10,456.44	13,644.23	12,993.42
Corsets	28,490.98	18,945.63	21,157.14	13,043.54
Dyes, drugs, chemicals, etc	61,824.76	45,368.26	25,665.01	21,993.89
Instruments	6,486.02	4,609.39	4,665.80	10,329.40
Ironware, steel, cutlery, etc	1,871.52	3,835.97	4,083.41	1,480.15
Jewelry and precious stones	....	1,387.60	858.38	471.89
Leather, hides, and skins	955.20	1,343.20	2,002.12	1,065.78
Linen, woolen, and cotton goods	60,361.41	37,984.01	102,878.48	43,674.31
Music, musical strings, and instruments	54,111.99	62,316.76	40,682.02	19,908.77
Prunes, dried fruits, nuts, land produce, etc	65,997.05	22,785.41	14,253.66	33,284.01
Sundries	37,929.59	42,709.47	30,432.29	24,589.30
Wine, brandy, beer, and liquors	766.64	468.28	1,300.83	....
Watches, clocks, and watchmen's detectors	1,729.80	1,465.75	1,863.80	539.31
Total from Stuttgart	332,445.92	253,676.17	263,487.17	183,373.77
Total for same period in 1892	231,337.86	268,045.08	328,998.96	329,240.99

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

Articles.	Quarter ending—			
	March 31.	June 30.	September 30.	December 31.
Total from the whole district.				
Braids, bindings and trimmings, etc	$246,700.23	$206,425.43	$585,962.76	....
Baskets and basket ware	57,725.48	72,131.16	80,084.19	$32,346.52
Brushes and hair pencils	17,426.23	16,486.39	20,811.71	7,790.90
Bronze powder and leaf metal	169,966.69	153,596.84	147,420.49	122,667.89
Books, stationery, photographs, and paper ware	240,526.68	260,229.41	222,381.62	164,305.57
Buttons and button stuffs, etc	59,908.77	19,115.40	7,776.85	15,771.47
Caps and cartridges	6,115.87	9,329.16	2,470.44	4,620.77
Cement	92,009.00	190,070.01	115,842.99	65,836.10
Clay	13,346.06	37,335.94	21,551.87	16,059.94
China, glass, porcelain, stone, and earthen ware	260,900.26	471,343.79	553,444.96	163,243.44
Corsets	28,490.98	18,945.63	21,157.14	13,043.54
Cologne water	3,660.27	2,847.46	2,519.21	2,938.40
Colored, photographic, and fancy paper	77,273.62	42,073.28	22,522.73	14,533.17
Decalcomania	27,184.72	22,727.27	21,860.67	12,285.83
Downs and feathers	898.19	8,692.38	1,976.59	....
Dyes, drugs, chemicals, etc	1,815,097.01	1,811,992.32	912,088.15	1,158,124.09
Fancy goods and toys	195,234.59	721,916.37	914,710.29	143.695.35
Glass plate, window and mirror glass	325,507.61	420,909.84	140,616.23	135,163.45
Gold, silver, and metal paper	8,632.57	22,475.06	15,249.95	8,790.35
Gas-burners, lava gas tips, brass lamps	5,264.75	7,033.78	4,353.29	4,112.57
Gloves	107.755.38	63,612.10	95,947.42	28,446.67
Hatters' fur	26.422.83	34,535.42	5,181.26	1,452.15
Hatbands and ribbons	444.582.59	482,674.49	31,874.68	298,182.40
Hair, prepared and raw	46,920.99	90,365.96	33,869.79	36,807.06
Hares' hair	78,449.72	58,545.79	51,270.82	35,522.56
Hops	272,878.08	37,053.20	1,758.99	222,137.26
Instruments	22,201.37	27,921.21	39,902.02	22,085.55
Ironware, steel, cutlery, etc	480,084.02	514,951.12	375,643.64	272,498.65
Jewelry and precious stones	119,507.75	137,666.64	88,013.17	53,764.07
Leather, hides, and skins	735,815.42	617,800.72	312,424.04	331,223.46
Leather goods	16,948.63	20,423.42	23,889.33	3,361.47
Leonic ware	18,856.39	9,361.62	7,359.07	3,191.39
Linen, woolen, and cotton goods	1,216,282.06	696,759.29	875,768.43	385,011.41
Lithographic stones and materials	25,750.45	21,508.74	16,037.96	11,350.75
Machinery	180,870.68	112,588.57	95,069.69	59,257.23
Mineral water	98,551.80	218,425.88	114,723.51	80,788.30
Music, musical strings, and instruments	70,439.89	82,481.46	58,967.44	27,520.56
Optical goods	8,561.14	13,379.45	11,006.41	10,374.50
Oil and glass paintings and chromos	29,195.41	40,427.33	51,679.02	32,678.06
Platina wire and platinum	90,038.76	106,706.88	72,380.01	70,382.70
Prunes, dried fruits, nuts, land produce, etc	219,475.91	94,976.87	77,039.94	228,623.89
Pins and needles	40,722.87	42.987.38	7,432.26	10,717.14
Seeds, plants, etc	20.397.71	1,059.58	8,141.27	55,936.84
Slates and slate pencils, lead pencils	36,522.08	39,973.01	24,921.20	23,722.03
Silk, silk goods, velvets, ribbons and braids, etc	1,302,790.34	1,453,394.83	1,488,582.64	443,269.96
Smokers' articles, snuff, cigars, and tobacco	11,643.58	15,197.24	11,445.11	14,298.09
Soaps and perfumery	18,231.85	6,788.31	8,241.57	5,635.27
Statuary and sculpture	9,430.31	9,762.82	10,590.78	9,626.74
Sundries	142,116.37	144,285.01	173,366.90	257,397.81
Steel (manufactured) and bessemer	78,271.01	146,854.69	54.379.75	16,734.74
Wine, brandy, beer, and liquors	411,886.66	546,606.65	270,431.25	375,402.84
Watches, clocks, and watchmen's detectors	12,339.06	24,842.71	21,181.86	8,254.91
Wool	....	18,326.66	....	....
Total	10,045,810.69	10,447,921.97	8,343,323.36	5,520,985.81
Total for same period in 1892	8,330,549.40	9,256,019.66	10,756,703.36	10,612,096.11

Exports for 1893 from Frankfort and its subordinate consulates—Continued.

SUMMARY.

Total for quarter ending March 31, 1893	$10,045,810.69
Total for quarter ending June 30, 1893	10,447,921.97
Total for quarter ending September 30, 1893	8,343,323.36
Total for quarter ending December 31, 1893	5,520,985.81
Grand total	34,358,041.83
Grand total for 1892	38,902,166.07
Grand total for 1891	37,386,587.43
Grand total for 1890	43,133,636.59
Grand total for 1889	37,162,389.54

FRANK H. MASON,
Consul-General.

SWITZERLAND.

Exports to the United States from St. Gall and the totals from the consular districts subordinate thereto during the year ending December 31, 1893.

Articles.	Quarter ending—				Total.
	March 31, 1893.	June 30, 1893.	September 30, 1893.	December 31, 1893.	
	Francs.	*Francs.*	*Francs.*	*Francs.*	*Francs.*
Bolting cloth (silk)	138,283.00	190,809.30	116,839.15	50,267.50	496,198.95
Cotton embroideries:					
Hamburg machine	4,487,758.20	2,117,046.84	1,904,731.56	6,289,232.55	14,798,769.15
Schiffli machine	219,935.25	159,277.23	56,729.16	137,711.35	573,652.99
Curtains (tamboured lace, vestibules, etc.)	2,469,820.20	1,028,080.56	2,307,128.20	488,047.65	6,293,076.61
Church articles	5,816.15		19,621.00		25,437.15
Dresses, aprons, handkerchiefs, ties, and other fancy articles	884,730.95	1,260,430.41	2,074,353.10	866,867.15	5,086,381.61
Figured and dotted Swisses	909,065.90	203,001.36	171,875.10	451,393.80	1,735,336.16
Laces	216,163.82	68,422.05	151,950.45	78,814.55	515,350.87
Machines and parts thereof	36,382.80	17,847.50	1,450.00	5,434.00	61,114.30
Metal embroidered articles	18,571.30				18,571.30
Milk (condensed)	10,048.00		5,875.00		15,923.00
Plain cotton cloth (muslins, cambrics, etc.)	192,792.45	130,301.17	41,197.50	104,862,80	469,153.92
Parasol covers	17,894.90				17,894.90
Ribbons	8,982.00		7,805.00		16,787.00
Silk embroideries	105,511.00	52,675.25	82,633.95	15,444.15	256,264.35
Sundries	12,026.30	12,739.18	7,257.60	3,867.65	35,884.73
Toggenburg articles		14,814.56	24,488.35		39,302.91
Total	9,733,782.22	5,255,445.81	6,973,929.12	8,491,943.15	30,455,100.30
Total in United States gold	$1,878,619.99	$1,014,302.81	$1,345,968.33	$1,638,945.06	$5,877,836.19
Consular district of Berne					851,038.59
Consular district of Basle					3,084,011.03
Consular district of Geneva					715,304.34
Consular district of Horgen					1,414,280.34
Consular district of Zurich					3,247,156.96
Total in 1893					15,189,627.45
Total in 1892					15,222,041.65

IRVING B. RICHMAN,
Consul-General.

TRADE OF SWITZERLAND—1893.*

BERNE.

In the district of Berne the export of cheese (the leading product) is less for the year 1893 than for the year 1892. Textiles are not being exported at all, and there seems to be no indication that they soon will be. Last year at this time orders for textiles were at hand in considerable numbers. The coming six months are expected to show a large decrease in trade with the United States. Tariff uncertainties are considered by merchants to be the chief cause of the depression.

BASLE.

In the district of Basle the condition of trade is absolutely demoralized. This is true of trade with all countries, but is especially true of trade with the United States. Large orders have not been placed here for a long time. Demand has been made only to satisfy present wants. This is true both of the watch and the ribbon industry. The stagnation in textiles is now such that the Government has had to organize a committee for the purpose of collecting funds for the poor. Three thousand textile workers are needing aid, and the number would be greater were not some of the rich silk manufacturers running their factories merely to prevent the starvation of their employés. The chemical industry is in a like alarming state. The causes of the heavy decrease in exports from the district of Basle during the past six months are (1) the monetary crisis in the United States, and (2) overproduction, creating heavy, unmarketable stocks.

The future condition of the Basle trade all depends on the financial developments in the United States. There will be a heavy decrease in exports to the United States for the first quarter of 1894, as compared with the corresponding quarter of 1893. The demand for goods from the United States, however, will not be materially affected. The necessity for them will cause them to be bought to about the same extent as in prosperous times. The capitalists of Basle will suffer heavy losses by reason of the nonpayment of bonds and shares of American railroads which have been placed in the hands of receivers.

GENEVA.

In the district of Geneva there has been during 1893, as compared with 1892 (which was an excellent business year), a heavy decrease in exports, especially of music boxes and watches. The amount of this decrease is 420,207.73 francs ($81,098.75). The causes have been (1) tariff uncertainties, and (2) the monetary crisis in the United States. A better feeling is now beginning to prevail. The agents of Geneva houses in America write more encouragingly to their principals. They predict a spirited and substantial revival of trade as soon as Congress acts on the tariff. As respects fine and cheap enameled jewelry, there already is a marked revival. A leading Geneva manufacturer in this line is receiving new and large orders, especially from Chicago. He can not employ men enough to get out the work. An invoice of cheap watches during the present week (the first for many months) is an excellent sign.

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*See table of exports to the United States from Switzerland, page 485.

Imports to the Geneva district from the United States are not increasing, and always have been inconsiderable.

HORGEN.

In the district of Horgen the export trade, which is chiefly in silks and half silks, is now dull, with no immediate prospect of a revival. All hangs upon the speedy settlement of the tariff.

American goods are not directly imported into the Horgen district, and it is difficult to say what amount and kind of such goods are consumed there.

ZURICH.

In the district of Zurich the exports for 1893 were $3,247,156.96, exceeding those of the preceding year by about $275,810. The present condition and outlook of trade, however, are dull. Very light orders are being received from the United States. American buyers are ordering only for present need. They await action on the tariff. Great hope is expressed by Zurich exporters that, with its settlement, trade will materially improve.

ST. GALL.

In the district of St. Gall, although the declared exports for 1893 are slightly greater* than for 1892, the stagnation in the embroidery trade at present is highly marked. Orders are being withheld on account of the tariff uncertainty. Wages have fallen 5 centimes per one hundred stitches—a decline of not far from 17 per cent. Many are out of work. There is some destitution, but not such as to demand Government aid.

CONCLUSION.

In the light of the above reports it becomes manifest how dependent for a livelihood the laboring classes of Switzerland are upon the United States. A business crisis there means a still more serious one here.

The exports from the United States to Switzerland, however, are comparatively inconsiderable. How to increase this exportation is one of the problems which the consular representatives of the United States in Switzerland hope materially to aid in solving.

IRVING B. RICHMAN,
Consul-General.

ST. GALL, *January 20, 1894.*

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*In the case of St. Gall the last six months of 1893, as compared with the last six months of 1892, show a decrease in exports of $787,589.09.

NOTES.

Discrepancy in Report on Trade of Japan, 1892.—Consul-General Tillotson writes December 20, 1893, that the discrepancy referred to in the note on page 294, CONSULAR REPORTS for November, 1893, in the tables accompanying his report is entirely attributable to the statistics furnished by the Japanese customs authorities, and not to error in his own calculations based upon those statistics.

Chemicals and Dyes on Free List in the Netherlands.—Minister Quinby, under date of January 9, 1894, informs the Department that the Netherlands Government has granted exemption from customs duties to chemicals, dyes, and other material of a similar nature used as auxiliaries in operations in factories or trades, and from spirits, excise, and customs duties to chemicals imported to that country destined for use in institutions for the instruction of natural sciences.

International Fruit Exposition at St. Petersburg.—Consul-General Crawford informs the Department (December 25, 1893) that the Russian Society for the Cultivation of Fruit, of St. Petersburg, will hold an exposition of fruit trees at that city from September 22 to November 12, 1894. He has been requested to induce American fruit-growers to attend and to become exhibitors. Particulars may be had through the Council, Agricultural Museum, Fontanka Quay, 10, St. Petersburg.

Imports into the Mexican Free Zone.—Under date of January 8, 1894, Minister Gray transmits to the Department a decree of the Mexican Government, issued on December 24, 1893, which provides for the free importation of foreign merchandise consigned from places situated opposite Mexican custom-houses and designed for consumption in frontier towns, provided the value of the merchandise does not exceed $50. Such importations are to be made under cover of import permits issued by the respective custom-houses. Should it be ascertained that merchandise admitted under an import permit exceeds the value of $50, a fine equivalent to double the consular charges collected for the certification of the invoice shall be imposed. The importer shall present a petition, in quadruplicate, to the customs collector, wherein declaration of the merchandise shall be made, carrying out all the requisites provided under article 44 of the ordinance, each full-sized sheet to bear legal document stamps of 50 cents each.

Need of American Agents in Asia.—Under date of December 11, 1893, Mr. Charles Seymour, consul at Canton, writes:

I find that nearly all goods of foreign production consumed here are sold in Hongkong by European merchants through their Chinese compradors and brokers. American merchants and manufacturers should know that there is not one American merchant in southern China devoted to sales of American or foreign goods. They should also know that British and German merchants, with their business connections established in Europe, will not push sales of American goods, in preference to European goods, upon Chinese buyers. I have repeatedly urged, in my dispatches on trade and commerce, the necessity of putting competent American salesmen in these Asiatic markets for the sale and delivery of American goods and productions in competition with European merchants and goods. In this way American flour, kerosene, provisions, cotton goods, etc., have found a growing business in Chinese markets, and only in this way the best method of packing goods for these markets can be ascertained.

American Trade in Mexico.—Under date of January 5, 1894, Consul-General Crittenden, of Mexico City, in a report relating to the consumption of American flour in his district, writes as follows in relation to American trade in general in Mexico:

All things are tending toward a stronger government and a more prosperous country. The United States, England, and Germany are now strong contestants for the trade of Mexico. The United States is making the greatest gain and would secure even more Mexican trade if our merchants would give closer attention to its wants, habits of trade, and methods of purchase. The merchants of the United States should have certain classes of goods manufactured for and adapted to this country and should educate a class of commercial men for this special trade. Whatever Mexican trade may have been in the past, there are cogent reasons for believing it will be much larger in the future.

Facilities for monetary exchange are not very extensive. Banks charge more for American exchange than for any other, and offer none other for sale than New York. Spanish exchange is cheapest, and German next cheapest. An American banking institution having correspondents in every important city in the United States would be desirable, and would do well in this city and perhaps in other cities of this Republic.

Changes in German Rates of Tare.—Under date of December 22, 1893, Mr. James H. Smith, commercial agent at Mayence, reports:

The German Bundesrath has decided that from the 1st of January, 1894, the following changes shall take place in the rates of tare allowed at the German custom-houses:

On polished and etched glass (No. 10*e* of the tariff), on which now no tare at all is granted, 40 per cent of the gross weight when in barrels, casks, or cases and 10 per cent when packed in baskets.

On ordinary prepared meat of cattle in hermetically sealed tins (No. 25*g1* of tariff), which has been having a tare of 16 per cent of the gross weight reckoned when in cases of soft wood of less than 45 kilograms (99 pounds), in future only 14 per cent; but when in cases weighing 45 kilograms or more, 18 per cent of the gross weight will be the tare.

On meat extracts in bottles, glasses, or jars packed in cases (also No. 25*g1* of the tariff), a tare of 31 per cent is to be allowed, in the place of the one of 24 per cent now observed. When in tins, in cases having a gross weight of 60 kilograms (132 pounds) or less, the tare in future is to be only 18 per cent; and when the cases reach or exceed the weight of 60 kilograms the tare is to be but 11 per cent of the gross weight. The tare now obtained is 24 per cent on these extracts in tins.

On unsmoked hams, salted and borax hams (No. 25*g1* of tariff), now given a tare of 16 per cent, the rate is to be but 13 per cent.

On caviar and caviar substitutes (No. 25*n* of the tariff) the tare, now 20 per cent when in kegs having a gross weight of over 5 kilograms (11 pounds), will be but 16 per cent.

On oleomargarine (No. 26*h* of the tariff) a tare of 17 per cent will be granted when in kegs made of oak having at least two iron hoops and twelve wooden hoops and a gross weight of 180 kilograms (396 pounds) or more. The present tare is 13 per cent.

Consular Reports Transmitted to Other Departments.—The following reports were referred during the month of February to other departments for publication or for proper action thereon:

Consular officer reporting.	Date.	Subject.	Department to which referred.
E. Schnéegans, Saigon	Dec. 30, 1893	Rice market	Department of Agriculture.
J. C. Monaghan, Chemnitz	Nov. 14, 1893	German food protection	Do.
Do	Jan. 10, 1894	Horses and cattle in the Kingdom of Saxony.	Do.
F. H. Underwood, Leith	Feb. 6, 1894	The Bimetallic League	Treasury Department (Director of the Mint).
Do	Feb. 8, 1894	The marine boiler; the need for improvement.	Treasury Department (Office of Steamboat Inspection).

EXTENSION OF MARKETS

FOR

AMERICAN FLOUR.

CIRCULAR.

On December 5, 1893, the following circular was addressed by the Department to all consular officers of the United States:

You are hereby requested to prepare for publication reports upon "The Extension of Markets for American Wheat Flour."

The following interrogatories cover the principal points upon which information is desired:

(1) What is the standard of living in your district? Are the people ready to eat American flour?

(2) What quality of flour is most used?

(3) What quantity of American wheat flour was imported into your district in the year ending June 30, 1891?

(4) What quantity in the year ending June 30, 1892?

(5) What quantity in the year ending June 30, 1893?

(6) What quantity of American wheat each year during the same period?

(7) What quantity of wheat flour from other countries during the same period?

(8) What quantity of wheat from other countries during the same period?

(9) What is the import duty on American wheat flour?

(10) What is the import duty on American wheat?

(11) What is the import duty on wheat flour from other countries?

(12) What is the import duty on wheat from other countries?

(13) What are the facilities for monetary exchange?

(14) What are the facilities for shipping from the United States to your port?

(15) If there are any obstacles in the way of the extension of trade in American flour, what are they?

(16) What, in your opinion, are the prospects for doing a more extensive business in American flour in the country in which you represent the United States?

In answer to questions 3, 4, 5, 6, 7, and 8 consular officers at seaports will furnish official statistics, others will furnish estimates.

Questions 9, 10, 11, and 12 are to be answered only by the consul-general in each country.

AUSTRIA-HUNGARY.*

The Empire of Austria-Hungary grows so much wheat that but very little wheat flour is imported, the principal import of breadstuffs being rye flour, which finds ready sale on account of its cheapness. The larger part of the Austrian population being poor and heavily taxed, there is but a limited market for flour of the better grades, and this is supplied by the home product.

In the Austrian cities flour of the better quality is consumed, but in the country bread made from rye or the lower grades of wheat flour is in general use.

During the years 1891–'93 the imports of flour and wheat into Austria-Hungary were:

Year.	Flour.	Wheat.
	Met. cent.	*Met. cent.*
1891	26,039	914,373
1892	12,912	1,190,286
1893	8,327	1,314,991

These figures are complete except for the year 1893, in which the returns for December have not yet been published.

The Government only furnishes statistics on the total import of flour, and it is consequently impossible to tell the exact amount of wheat or rye flour imported.

The duty on wheat flour is 3.75 florins in gold† per 100 kilograms (220 pounds). On wheat the duty is 1.50 florins in gold per 100 kilograms. The import duty on wheat and flour is the same for all foreign countries with the exception of Servia, which pays only 0.75 florin per 100 kilograms.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange between Austria and London, Paris, and Berlin are excellent; but there is so little business done with the United States that the facilities therewith are not good. Even the official daily Cours-Blatt does not give New York exchange.

The facilities for shipping from the United States to Austria-Hungary are not the very best. Trieste and Fiume are the only seaports of this Empire. The Austrian Lloyd Steamship Company has a regular line of freight steamers plying between New York and Trieste, and it is possible to ship grain via Germany; but the rates are higher from the United States than from the countries from which Austria imports grain.

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* This series of reports was begun in the February number (161, p. 395).

† 1 florin in gold (new) = 40.6 cents; 1 florin in gold (old) = 48 cents, the coin in which duty is paid at present

OBSTACLES TO TRADE.

The greatest obstacle to the extension of the trade in American wheat with Austria-Hungary is the fact that Austria-Hungary is an agricultural country and produces more wheat than it consumes. The milling industry, especially in Hungary, is conducted on a large scale. With the high protective tariff of Austria and a long journey, it is practically impossible for American flour to compete under ordinary circumstances. The duty on wheat is relatively lower than on flour, and in case of bad crops it might be possible to export some of the cheaper grades of wheat. In this case, however, the United States would have to compete with Russia, which is so dependent upon the money received from foreign sources for its agricultural products that even during the famine of 1892 large amounts of wheat were exported.

As the duties on goods entering Austria are paid in gold, which is at a premium of 25 per cent, it is difficult to import any but the most necessary articles.

MAX JUDD,
Consul-General.

VIENNA, *January 26, 1894.*

BOHEMIA.

PRAGUE.

WHEAT FLOUR.

The principal food of the people in my district is flour—wheat and rye. The aim of those buying flour is to purchase it at the lowest possible rates, regardless of its origin. The cheaper grades of flour are used by the rural and industrial classes and the finer qualities in small proportions in cities. No American flour is imported into this district.

Bohemia manufactures a good deal of flour from its home-grown wheat, but the amount is not enough to meet the home demand. The deficiency is chiefly supplied by Hungary. Hungary is a large wheat and flour producing country, the largest flour mills being in Buda-Pesth, distant 375 miles from this city, the principal flour market of Bohemia.

The Hungarian millers supply flour at cheaper rates than the Bohemian millers can manufacture it at the present prices of wheat. A suspicion exists among the Bohemian millers that the Hungarians are buying wheat at low prices from Roumania, Servia, and southern Russia, without paying any duty thereon, by certain manipulation, which is explained more particularly in the following translation of an interpellation by one of the members of the

Bohemian Diet, made on January 8, 1894, in behalf of the millers of his country:

A committee of the millers' association met at Vienna last November, where the supposition was expressed that the competition of the large Hungarian flour mills against our home establishments is supported and facilitated by the excessive use, if not by the abuse, of the so-called "refining process," according to which system enormous quantities of Russian and Roumanian wheat, and also wheat from the Balkan states are shipped to the Hungarian flour mills to be manufactured into flour. This matter was also thoroughly discussed at the last meeting of the members of the Chamber of Commerce at Prague, which body came to the conclusion that the excessive use of the bounty on flour by the Hungarian mills is the principal basis of their competition. As a result the large Hungarian mills sell their products in our markets at an average of one florin (40.6 cents) per 220 pounds cheaper than our home mills can produce. If from these low prices 20 to 30 kreutzers (8 to 12 cents) are deducted on account of the present low freight rates, there still remains a difference of 70 to 80 kreutzers (28 to 33 cents) per metrical centner (220 pounds) in their favor. Taking this calculation as a basis (Buda-Pesth price current of flour, farina, and bran), we find that 100 kilograms (220 pounds) of wheat, of which a hectoliter (2.8377 bushels) has a weight of 78 kilograms, will yield 8.89 florins ($3.61) worth of mill products. From this amount must be deducted the agent's commission, the usual discount from the bill, and the expense for packing, which altogether amount to at least 75 kreutzers (30½ cents), leaving 8.14 florins ($3.30½) net. The metrical centner of wheat of 78 kilograms per hectoliter costs 7.90 florins ($3.20¾), so that the difference between the raw material and the manufactured product is only 24 kreutzers (9¾ cents). Inasmuch as the annual reports of the Hungarian millers show that one metrical centner of wheat costs 1.10 florins (44.6 cents) to manufacture into flour, there is here a problem which in the interest of our home industry calls for a thorough and satisfactory explanation.

It is a well-known fact that the Hungarian flour stock companies do not work at a loss; on the contrary, they pay their shareholders and managing committee large dividends, so that a conclusion can be drawn that those large mills manufacture the raw material at cheaper rates than the home wheat can be purchased in the Buda-Pesth market. It is also remarkable that, according to statistical data, the import of Roumanian, Servian, and Russian wheat is steadily increasing, which fact is shown by the Hungarian official statistics, namely:

The export of Hungarian flour to Austria proper in the year 1882 was 1,579,000 metrical centners; to foreign countries, 1,336,000 metrical centners; but in the year 1892 we find that the export of Hungarian flour to Austria proper reached 4,017,000 metrical centners, whereas the export to foreign countries amounted to only 955,000 metrical centners.

But more remarkable still is the fact that as the export of Hungarian flour to Austria proper increases, the import of wheat from the Balkan states increases in like proportion in consequence of the refining process—the ministerial decree of May 29, 1882, permitting grain from foreign countries to be imported free of duty for the purpose of being ground in the home mills, provided the flour made from the duty-free grain is reshipped across the frontier within a specified time. In consequence of this, the amount of grain imported free of duty in 1882 amounted to 57,000 metrical centners; in 1884, 254,000 metrical centners; in 1890, 455,000 metrical centners; and in 1892, 1,323,000 metrical centners. From the figures quoted, we notice that the export of Hungarian flour to foreign countries is declining, while the exports to Austria proper are rapidly increasing; also, that the import of the duty-free grain is increasing. If the export capability of the Hungarian mills is caused by the import of the duty-free grain from foreign countries, the result would be an increase and not a decrease of the export to foreign countries; but the increase of the export of Hungarian flour to Austria proper and the decline of the export to foreign countries go to prove the supposition that the flour made of the duty-free foreign grain (a much cheaper raw material) is that which comes into competition in our markets. Attention is also called to the fact that the flour which is destined for foreign countries—for England, Holland, Belgium, etc.—must be, in view of the transoceanic competition, of the finest quality; and yet hardly more than 30 per cent of such flour can be obtained from the raw material, the rest remaining for home consumption. The Balkan grain is inferior in quality, and 30 per cent of first-class flour can not be obtained from it; consequently flour made therefrom can not be used for the foreign trade.

It can therefore be positively asserted that the flour which is exported to foreign countries is made from Hungarian wheat (which is superior in quality), whereas the flour made from the "duty-free" wheat is thrown into our markets, causing an insuperable competition to our home establishments. No proof of identity is required, and the term which is fixed for giving to the exporter a bounty on flour is extended to suit the Hungarian mills. What such an advantage means every business man can easily comprehend. The bounty system as it is practiced now by the Hungarian mill-owners is contrary to that which was contemplated by the protection to grain at the time the bill was introduced. We now see that the large Hungarian mills only are benefited thereby, because it enables them to buy cheap grain and realize bounty on the flour they export to foreign countries. The tariff law expressly requires proof of identity and makes all refining methods dependent on such proof by stating that articles may be imported into this country without paying any duty within the limits of the refining process, but fixes a time within which the flour manufactured therefrom must be exported to foreign countries. It is only when exported that the identity of the imported raw material can be proved.

The quality of flour is divided here into nine grades—Nos. 0, 1, 2, 3, 4, 5, 6, 7, and 8, and the following wholesale prices are charged at Buda-Pesth per 100 kilograms (equivalent to 220 American pounds):

Grade.	Price.	Grade.	Price.
0	$5.27	5	$3.90
1	5.03	6	3.49
2	4.71	7	2.88
3	4.34	8	2.19
4	4.06		

The freight from Buda-Pesth to Prague per carload amounts to 51 cents per 220 pounds.

How much flour is yearly imported into Bohemia it is impossible to state, because there are no statistics nor records of any kind kept. I tried to ascertain an approximation thereof from the wholesale dealers, but failed.

DUTY ON FLOUR.

The duty on wheat flour into Austria-Hungary is 3.75 florins in gold ($1.80) per 100 kilograms (220 pounds).

WHEAT.

Wheat is imported into Bohemia only from some of the Austro-Hungarian states—Moravia, Hungary, etc. In 1892, according to the statistical records of the agriculture department of Bohemia, of all the tillable soil in Bohemia 97.39 per cent was sown or planted and 2.61 per cent left fallow. Of the soil devoted to grain, wheat occupied 42.4 per cent, and yielded 4,906,000 hectoliters (13,921,756 bushels). The present price of wheat per 100 kilograms is from $3.29 to $3.65.

The import duty on wheat is 1.50 florins (72.3 cents) in gold per 100 kilograms. The duty on flour and wheat imported into Austria-Hungary is uniform, no exception being made.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange here are excellent. In the city of Prague there are five large banking institutions, with branches in the larger cities of Bohemia, which have direct communication with banking houses in the United States. There are also several smaller banking firms doing direct foreign-exchange business.

Shipping communication between the United States and Bohemia can be conveniently effected only via Hamburg and Bremen, which ports are connected with the capital city of Bohemia (Prague) by railway and by navigable river. The distance from Hamburg to Prague is 661 kilometers (413 miles) and from Bremen 692 kilometers (433 miles).

Freight rates by both rail and water from Hamburg and Bremen to Prague per carload of 100 metrical centners (22,046 pounds) is as follows:

From—	By water.	By rail.
Hamburg	$23.80	$56.64
Bremen	30.94	58.31

OUTLOOK FOR TRADE.

It rests with the American millers to decide whether they can place their wheat flour on Bohemian markets at as cheap rates to the consumer as other millers do. I am satisfied that if American wheat flour could be furnished to the consumers here at the same price as others furnish it, considerable business could be done. I am also satisfied that cheaper grades of flour would sell better in this country than the finer qualities.

JOHN KAREL,
Consul.

PRAGUE, *February 12, 1894.*

REICHENBERG.

Northern Bohemia is known as the most populous district of Austria-Hungary, and the consumption of flour is therefore extensive.

As the entire country is very mountainous, agriculture is in an inferior state of development. It is a well-known fact, however, that the most important manufacturing interests of Austria are located in northern Bohemia, and consequently the greater part of the population consists of workingmen.

American flour has never been imported into northern Bohemia, nor will it ever be under existing conditions.

Only a few decades ago the milling interests of northern Bohemia were of considerable importance, but this branch of business has been almost driven out of existence by the competition of Hungary, and is now carried on only on a small scale.

Hungarian millers completely control the flour and wheat market of Austria, and hence of northern Bohemia; and it is impossible for the few mills yet in operation to compete with the production of Hungarian mills. It is well understood by those who pretend to be posted, that it is only a question of a very short time when mills still in operation here must shut down forever.

The amount of wheat now ground in this district is very insignificant.

QUALITY OF FLOUR USED.

The quality of wheat flour used here is principally of a fine grade, and for this reason northern Bohemia seems to be the field sought by Hungarian millers, as their lower grades of flour are used at home.

IMPORTS OF FLOUR AND WHEAT.

The import of flour from other countries has entirely ceased in northern Bohemia since the duty on it was established. Importing flour would not pay because the duty is too high.

A few years ago large quantities of American rye were imported into northern Bohemia by the way of Hamburg, but the increase of duty on grain and the low prices of grain throughout Europe have shut out this import. A further obstacle in the way of cheap transportation and the counteraction of the high duty is the extraordinarily low state of the water in the River Elbe for the past few years, which has prevented the utilization of this route for shipping purposes from Hamburg to Bohemia.

C. HUGO JACOBI,
Consul.

REICHENBERG, *January 17, 1894.*

BELGIUM.

STANDARD OF LIVING.

The people in this consular district (Brussels) eat equal proportions of bread and potatoes, potatoes occupying as high a valuation in public estimation as bread. The people are ready to eat American flour, provided it can be purchased at advantageous figures.

The average price of wheat, irrespective of origin, in the markets of Belgium during the month of October, 1893, was $2.85 per 220 pounds.

The best quality of flour is most used.

It is impossible to specify the amount of American wheat flour imported into this district in any year, as flour is not reported separately in the Belgian statistics. Flour, bran, alimentary feculas, and meslin of all sorts are classed under one head. Thus during the year ending June 30, 1891, 38,736,651 pounds of flour, bran, alimentary feculas, and meslin were imported into Belgium from the United States, 51,818,428 pounds in 1892, and 47,322,598 pounds in 1893.

Wheat is not reported separately in the Belgian statistics, wheat, spelt, and meslin being classified under one head. I am informed that the statistics really concern wheat, as very little spelt or meslin comes from the United States. During the year ending June 30, 1891, 236,058,842 pounds of wheat, spelt, and meslin were imported into Belgium from the United States, 1,230,534,423 pounds in 1892, and 608,886,801 pounds in 1893. The quantities of milled cereals (wheat, spelt, and meslin) imported into Belgium from other countries during the years ending June 30, 1891, 1892, and 1893, were as follows:

	Pounds.
1891	16,696,334
1892	150,251,833
1893	132,913,787

The quantities of cereals (wheat, spelt, and meslin) in bulk imported into Belgium from other countries during the periods above mentioned were:

	Pounds.
1891	2,170,579,873
1892	1,667,185,126
1893	1,506,393,691

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are through the banks. Payments are by draft at thirty, sixty, or ninety days. The rate of exchange varies from 5.17 to 5.30 francs to the dollar. Goods arrive by vessel from the United States and are distributed to the interior by railroad and canal.

TRADE OUTLOOK.

As far as I am able to learn, there are no obstacles in the way of the extension of trade in American flour in this consular district. From information gathered in conversation with importers, I find a general preference for American wheat and wheat flour, and a desire to increase its consumption. This increase can be accomplished if our products placed upon the Belgium markets equal or exceed in quality the European wheat and wheat flour and are sold at the same price.

DUTIES.

There is no duty on wheat and flour coming into Belgium.

GEO. W. ROOSEVELT,
Consul.

BRUSSELS, *January 5, 1894.*

FRANCE.

AMERICAN GRAIN AND FLOUR TRADE.

There has been for some years past an increasing demand in France for American wheat, which, when mixed with the softer French wheat, produces an excellent flour, and for this purpose such importations have become very considerable. The opinion generally prevails that when the French and American wheats are mixed and ground the flour is the most perfect that can be furnished; and it is further asserted by those whose interest lies in the flour industry that the American flour can not at present compete with either the local product or the Hungarian flour sent to this market.

Whether the preference for the inland and Hungarian flour over the American product is entirely justified, it is difficult to say; but it is quite possible that it arises from an apprehended danger of competition, and from the fact that inferior grades of American flour have from time to time been foisted upon the European market. It is a mistake to suppose that inferior flour can be put upon this market with success. Let the best grades be offered on the most favorable terms, and it will soon be seen whether competition be possible. In the production of all food supplies the United States are acknowledged to be the "growing giant that threatens to crush all competition," and an apprehension of this fact has caused the millers of France, Switzerland, and Hungary to make extraordinary efforts to improve the quality of their flour. With this object they are not slow to make improvements in their mills in order to turn out the highest and best grades of flour; but it is not probable that the American miller will be deterred by any mechanical difficulty from entering the European markets. As already stated, Switzerland and Hungary are the only countries foreign to France that occupy this market, and there is certainly a wide field here for the introduction of American flour if the people can be made to see that it is of uniformly good quality and somewhat cheaper in price.

IMPEDIMENTS TO IMPORTATION.

It can be stated with satisfaction that the transport houses and shipping agents here lose no time in duly executing American orders and in adopting, as far as possible, measures calculated to expedite business; but it is obvious that not only the quality, but the price, of the American product must be adjusted to compete with European products. It must have something more than the mere name of "American" to commend it. A higher grade and lower price than foreign brands is the great desideratum; but against this stands the ocean freight rates, etc. The French tariff on flour is the same for all countries, viz, $1.54 per 100 kilograms (220 pounds); but as this is met by other countries exporting flour to France, notably Hungary and Switzerland, it would seem that the American exporters, notwithstanding the disadvantage of somewhat higher freight rates, may yet be able to compete for this trade, since the American power of production grows in a far greater proportion than that of European countries, which have about reached their climax and will now rather go backward than forward in proportion to their increasing population.

ENLARGING THE TRADE IN AMERICAN FLOUR.

I believe the most practical means for this purpose would be for the exporter to communicate with firms who are perfectly familiar with the demands of the French market, and who are at the same time experts competent to point out faults and suggest remedies. Perhaps the formation of a syndicate with a large capital to set up a house in Havre, under the management of a competent agent, might prove a successful venture. Under no circumstances should the consignments be made to houses selling flour from other countries, or even the local output. It has been observed that this practice has done much to bring American goods into disrepute in this country; for in nine cases out of ten such a consignee will make no effort to sell the American article, and his recommendation of it is always feeble. The agent should be an experienced person, of good address, familiar with foreign life and customs, and who speaks the French language fluently. He could either take orders for consignments beforehand, and then have the flour forwarded for delivery, or he could keep a supply always on hand. It is believed that such a scheme would be successful and finally result in opening up a large market for American flour. All circulars and catalogues should be printed in the French language.

STANDARD OF LIVING.

In this part of France (Normandy) many hundred years of commercial success and intellectual work have developed a people of superior mental activity and a delicacy of taste which seems to have become innate. Under such circumstances the standard of living in this consular district may be rated as quite equal to that of any other country or district in Europe. But, considering the fact that France ranks second to the United States as a wheat-growing country (the average annual harvest being about 325,000,000 bushels), and that since the advent of the phylloxera and other maladies of the vine she is giving more and more attention to the production of her own food supply, it would not be safe to say unreservedly that the people as a nation are quite "ready to eat American flour," unless it can be made obviously to their interest to do so.

At the present time there is believed to be some demand for American flour, growing out of the failure of the wheat harvest in 1892 and the protracted drought that extended over western and central Europe in 1893.

It is to be noted further that the disproportion between the grain producing and consuming capacity of France is considerable and yearly increasing, and the deficiency in the crops of the last two years—1892 and 1893—must be made good from some other quarter of the globe, In the discussion of this important portion of the French food supply, the whole grain crops of the country and the entire imports of all kinds of cereals—*i. e.*, grain and flour—would require to be taken into consideration, and this large question can not be here entered upon.

Annual yield of wheat in France for the decade ending December 31, 1893.

Year.	Quantity.	Year.	Quantity.
	*Hectoliters.**		*Hectoliters.**
1884	103,753,426	1889	98,740,728
1885	114,230,977	1890	108,319,771
1886	109,861,862	1891	116,915,880
1887	107,238,082	1892	81,889,070
1888	112,456,107	1893	90,000,000

*1 hectoliter = 2.838 bushels.

The best wheat flour (family and patent) is preferred by all classes in Havre and is the only kind of American flour used by the bakers, who prepare all the bread consumed by the population. This grade, though not considered quite equal to the best grades of Hungarian flour, is also used for pastry and other purposes indispensable to the baker and cook. The practice of shipping indifferent qualities of flour to this market can not be too strongly condemned. All flour sent here should be of uniformly good quality and just what it is represented to be. It should be free from all grit and lumps, from all smell of damp or moldiness, and it should have no acidity of taste. All flour is subjected to crucial tests, and if it falls short in the essential qualities of a good flour it is instantly rejected. The baker roughly measures the quality of flour by observing the tenacity, etc., of the dough when drawn out; but a more accurate means of determining the quality has been provided in the aleurometer, an invention of M. Boland, a Parisian baker, which is now generally in use.

The following analytical statement indicates the composition of flour which is regarded here as a good, sound article and readily salable:

Components.	In 100 parts.	In one pound.	
		Ounces.	*Grains.*
Water	13	2	35
Fibrin, etc	10.5	1	297
Starch, etc	74.3	11	388
Fat	0.8	0	57
Cellulose	0.7	0	44
Mineral matter	0.7	0	49

IMPORTS OF WHEAT AND FLOUR.

The importation of cereals (grain and flour) into France from all quarters in 1891 amounted to 588,446,900 kilograms.*

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*1 kilogram = 2.205 pounds.

The following table of imports at Havre will in small compass present a general answer to questions 3, 4, 5, 6, 7, and 8:

Country.	Wheat.	Wheat flour.
1891.		
United States:	*Kilograms.*	*Kilograms.*
Atlantic coast	261,089,700	22,682,700
Pacific coast	183,740,200	
Total from United States	444,829,900	22,682,700
From other countries	112,056,700	2,151,400
1892.		
United States:		
Atlantic coast	130,623,000	960,100
Pacific coast	138,828,800	
Total from United States	269,451,800	960,100
From other countries	55,837,800	517,200
1893.		
United States:		
Atlantic coast	71,445,700	112,700
Pacific coast	69,933,400	
Total from United States	141,379,100	112,700
From other countries	87,614,700	537,300

MONETARY EXCHANGE.

Banking facilities in Havre are all that could be desired, and banking establishments charged with floating loans have done so with so much success that they have been enabled to pay their shareholders increased dividends. The American gold dollar is worth at this time in exchange 5.18 francs* and the English sovereign, or pound, sells for 25.19 francs.

FACILITIES FOR SHIPPING.

The facilities for shipping goods from the United States to Havre are abundant and regular. Three lines ply regularly—(1) the Compagnie Général Transatlantique, weekly to New York; (2) the Compagnie Commerciale, monthly to New Orleans; (3) the Chargeurs Réunis, to New York and New Orleans regularly, and to other American ports as occasion may require. Besides the above regular lines of steamers plying between Havre and the United States, other steamships bring freight directly to this port from New York, Philadelphia, Baltimore, Norfolk, Charleston, Savannah, Apalachicola, Pensacola, Mobile, New Orleans, Galveston, San Francisco, etc. Occasionally large sailing vessels arrive loaded with cereals from the Pacific coast. The steamship companies of England, Holland, Belgium, Germany, and the American line also land goods for Havre at their respective European ports, which are reshipped by coastwise steamers or by rail for this port. A daily line of channel steamers connecting with the American line, the North German Lloyds, and the Hamburg-American Packet Company run between this port and Southampton.

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* 5 centimes=1 sou, or a small fraction less than one American cent; 100 centimes=1 franc; 1 franc=19.3 cents.

TARIFF CHARGES.

The following table shows the French duty on American wheat and flour per 100 kilograms:

Description.	Duty.	
	Francs.	
Wheat grain	5	$0.96½
Ground wheat:		
Yielding 70 per cent or more of flour equal to American "Superfine"	8	1.54¼
Yielding 60 to 70 per cent of flour equal to American "Extra"	10	1.93
Yielding 60 per cent or less of flour equal to American "Family" or "Patent"	12	2.31⅛

Samples of flour corresponding to the bolting must be deposited in the custom-house offices as types for the verification of said flour.

OBSTACLES TO TRADE.

The great barrier to an extended use of American flour in this market is the customs duty, but I am informed that objections have also been made to the quality of the flour hitherto imported. If this fault is remedied and flour sent here of the same quality as that imported from Hungary, there would seem to be no doubt that our millers could compete in this market, notwithstanding the import duty.

C. W. CHANCELLOR,
Consul.

HAVRE, *January 18, 1894.*

ADDENDUM.

In France flour is delivered to the bakers only in large sacks, barreled flour being sold almost exclusively for use on board ships and for export purposes. The foreign flour barrel is smaller and more substantial than that used in the United States. There seems to be a very general belief here that flour packed in bags is better in quality and keeps better than the barreled flour. Whether this opinion is correct or not, the French people are firmly convinced that such is the fact, and it is quite useless to attempt to argue them out of the belief or to prepare flour for shipment to this market except in conformity with the usage of the country and wishes of the consumers. It follows, therefore, that flour intended for export to France should be contained in bags and so packed as to exclude dust and moisture.

As already stated, the quality of the flour intended for sale in France is of the first importance, since indifferent flour finds no favor with the bakers, who, after all, are the arbiters of the flour market, homemade bread being practically unknown in France. The smallest village or settlement has a baker who supplies not only the immediate inhabitants, but all families in the neighborhood, with bread, which must be of a standard quality, and this can only be attained or made from flour that compares favorably with the "douze marques," or standards by which flour is bought and sold in France. The bakers at Havre are quite suspicious of American flour, for the reason that several lots of indifferent flour imported from the United States have been put upon this market, to the detriment of their trade. Flour, however, ground at Paris from American wheat, and equal in quality to one of the "12 marks" is used to a considerable extent to mix with the French flour.

The gluten or fibrin, which contributes so largely to the nutritive quality of French and Hungarian flour, is said to be often deficient in American flour. In the manufacture of the former the gluten is carefully preserved for the benefit of the bread-consumer, whereas it is stated that this nutritious element is extracted by the American millers, in order to impart a whiter appearance to the bread, but at the expense of both its strength and flavor. The grayish or brownish tinge and superior flavor of the Italian macaroni and Italian bread, as compared with similar products made from American, or even French, flour, is said to be largely due to the excess of gluten contained in the Italian flour, the Italian wheat surpassing all other in the quantity of gluten which it contains.

As the price of flour in France is regulated absolutely by the prevailing price of wheat, the result of the debate now in progress in the French Chamber of Deputies on the proposed increase of duty on wheat may exercise an influence of no little moment on the market for American flour in this country.

But it must not be taken for granted that this new customs barricade against the introduction of foreign wheat into France will, if erected, necessarily augment the price of either wheat or flour. Indeed, the experience of the past would seem to controvert such a theory. It has been clearly shown by statistics that the market price of wheat in France has steadily declined, instead of increased, since the duty on cereals was first imposed, and at this time wheat is actually 3 francs (60 cents) less per 100 kilograms (221 pounds) than it was in 1884, before the duty was established.

If such a thing were possible, a firmly established commercial treaty between the United States and France, involving solid and durable advantages to each of the contracting parties, would go far toward breaking down the fiscal barriers which hamper the commercial intercourse between these two great countries, and would at once open an extensive and liberal market for most of the food products of the United States.

C. W. CHANCELLOR,
Consul.

HAVRE, *February 12, 1894.*

NANTES.

STANDARD OF LIVING.

The staff of life in the consular district of Nantes, which embraces the entire northwestern coast of France—*i. e.*, Loire-Inférieure, Morbihan, and Finisterre—is wheat and its products. The quantity of bread consumed is simply enormous and is continually on the increase.

The quality of flour most used is "bolted flour"—*farine blutèe à* 30 per cent. The first and second quality of "groats" are also in very great favor. And here I desire to mention especially the "small white wheat" of Michigan, which is highly prized by the French people, although they get very little of it.

IMPORTS OF WHEAT AND FLOUR.

The quantity of American wheat imported into this consular district during the years 1891, 1892, and 1893 was extremely small, almost insignificant. This, I think, has been the fault of American shippers and merchants, and not the lack of desire on the part of French people to consume American wheat and its products, which, as I have already said, they esteem highly.

The quantity of American wheat flour imported into this consular district in the years 1891, 1892, and 1893 was nil.

The quantity of American wheat imported in 1893 was as follows, none being imported in 1891 and 1892: General shipments, 19,805 kilograms; special shipments, 20,590 kilograms; total imports, 40,395 kilograms.

The quantity of wheat imported from other countries into this consular district during the foregoing years was mostly from the Black Sea region and was as follows:

Year.	General.	Special.	Total.
	Kilograms.	*Kilograms.*	*Kilograms.*
1891	9,187	39,316	48,503
1892	12,074	11,234	23,308
1893	107,550	103,892	211,442

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are perfect, and are exactly the same as those of Paris.

As to shipping facilities from the United States to this port and its consular dependencies, nothing more could be asked than is supplied both by nature and the engineering skill of man. The ports of Nantes (with its magnificent canal), St. Nazaire, Brest, L'Orient, etc., offer every possible facility for discharging cargoes of wheat or any other merchandise. But I would especially call the attention of American shippers to the ports of Nantes and St. Nazaire. Vessels of 3,000 tons and over can now discharge their cargoes directly upon the quays of Nantes, the principal city of this region. I would also call attention to the city of Angers, which is an island consular agency and a great flour and wheat market. This city could be easily reached by St. Nazaire.

TRADE OUTLOOK.

In my opinion, there is no reason why American flour should not be more extensively used than at present in this consular district. As I have already said, it is highly appreciated on account of its nutritive qualities, much more highly, indeed, than the French wheat or wheat from other countries. But, in supplying the districts of the Loire-Inférieure, Morbihan, and Finisterre, it is a mistake to ship the grain to Havre, as has been done heretofore. American wheat can never be introduced into this section of France in that way. The freight charges from Havre to the various destinations are too great. The grain should be shipped directly to Nantes or St. Nazaire, which cities are the distributing points of this consular district.

As to the obstacles in the way of introducing American wheat and wheat flour, there are at present none, except the tax of 5 francs per 100 kilograms imposed upon importations from any and every country. But there is a prospective obstacle in the threat to levy a prohibitive tax on all foreign wheat and its products. The Agricultural Society of France, seconded by one of the deputies of the north, has asked and urged the French Government to impose an additional tax of 5 francs (96.5 cents) on each 100 kilograms of foreign wheat and its products that may hereafter be brought into France. The French farmers are alarmed at the increasing influx of foreign grain and propose to stop it. Whether or not they will succeed in imposing an importation tax of 10 francs on every 100 kilograms of wheat and its products imported into the country is doubtful; but the pressure to this end is very great, and the cause of the farmers is very ably presented to the Government at Paris by their delegates. It is my opinion that they will succeed, and that the additional tax will be imposed.

REAVEL SAVAGE,
Consul.

NANTES, *January 26, 1894.*

NICE.

THE RIVIERA.

The Riviera is a name given to the southern coast of France extending from St. Raphael on the west to San Remo on the east. It is a district devoted to sanitation and pleasure, and is known as the winter resort of Europeans and Americans who seek to avoid the rigors of severe climates or who seek rest and recreation. Its trade depends largely upon the Americans who seek the pleasures of this sunny land and who spend large sums of money for personal expenses from December till May.

The city of Nice, which is the chief center of attraction, combines the advantages of mountain air and sea breezes, being situated within a semicircular space of territory bounded by the Maritime Alpés and the Mediterranean Sea. It is well built, with handsome houses and villas and numbers of hotels of a most excellent character. Its pleasures are varied and offer many attractions to the invalid. Hence there are added to its resident population of about 90,000 citizens perhaps as many as 20,000 travelers during the time above mentioned, and during the carnival there are many additional thousands who come here for two or three weeks. Cannes, Monte Carlo, and Mentone are other places within the district which have their attractions for those who seek the Riviera during the same season. Upon the influx and efflux of these strangers depend the conditions of active or stagnant business. Though all these places are seaports, they have no other commerce than that which depends upon the conditions above stated, except in a small degree. Cannes exports perfumery, and there is a very small export of olives and olive oil from Nice. In consequence of these facts, the coast trade of the Riviera is carried on by steamers which run at intervals from Marseilles and Genoa and coasting sailing vessels.

Marseilles and Genoa, being important cities of foreign commerce, the Riviera, which lies between them, is generally supplied in all its foreign wants by coasting vessels or by railway from these two cities. The country is in a high state of cultivation, and its internal wants are supplied by the industry of its people. No ground is idle, except the gardens of the rich, and even these produce abundant fruits. Hence the people of the country produce all that is necessary for their own living and contribute largely by their surplus to the demands of the neighboring towns and villages. Those who live in the country districts raise wheat and other grains, and their bread is homemade from their own production.

STANDARD OF LIVING.

The standard of living in the towns of the Riviera is high—perhaps exceptionally so—as compared with other countries, for, since the standard is raised by the great influx during the winter, money is easily earned and wages are generally high, making the conditions of living costly and, as a rule, much more expensive during the whole year than in the United States. Limited incomes find a speedy end, and only economy can meet the demands which exist because of unusual conditions. The taste of the people leads them in the cities to have excellent articles of food; and as a rule their means of living being greatly enlarged by their intercourse with their foreign visitors, they seek always the best qualities of food supplies. This is specially noticeable in the bread found in the cities, for, as the peasants furnish their own bread supplies, it is only in the cities that foreign flour can find a market. And here the law of supply and demand governs trade, as everywhere. The people and their guests demand the best bread and at the cheapest prices obtainable. Dealers therefore naturally ask, what is the quality and what are the prices. They will buy the best at the cheapest prices, and do not concern themselves as to whence an article comes. Flour is sold here by brokers, who furnish samples and prices, and who take orders, generally bringing their supplies from Marseilles, Genoa, or at times Havre. These brokers supply hotels and bakers, who in their turn supply all the people. The housewife here does not buy flour, but bread. The flour used in private families, therefore, is very limited as compared with the bread consumed. Dealers, therefore, would naturally desire American flour if the quality and price could advantageously compete with the supplies derived from other sources. Hence the importance—a fact which can not be too strongly emphasized for the benefit of American millers and exporters—of being systematically represented here by experienced agents who could offer advantages on the markets.

AMERICAN FLOUR.

American flour is said to have been brought here in small quantities from Havre and to have been sold at better terms than other kinds, even against great disadvantages of freight, etc., but this is reported to have been of the finest quality. One great need is perfect whiteness, a quality greatly prized by bakers, hotels, and restaurants. The retail price of bread here is just about what is usually paid for the same qualities and weights in the large cities of the United States, but the essential quality of whiteness must always be remembered.

In obtaining statistics upon which to base figures, the consul is compelled to employ persons who have both expert knowledge and access to clerical officers through personal acquaintance and friendship, for, while a courteous offer would doubtless at all times be made to a consul to examine the various books, still it would be absolutely impossible to avail himself of such an offer in great offices where such masses of papers must be searched, even if he could leave his office for such purposes. I have employed a business man of large experience at my personal expense to obtain the data herein given, and his labor has been supplemented by personal influence and friendship of different clerks in the custom-house, board of trade, and commercial houses.

There was no importation of American wheat flour in this district, from searches thus made, during the years 1891–'93.

AMERICAN WHEAT.

American wheat importations were as follows:

	Tons.
1891	None.
1892	250
1893	997

IMPORTS OF FOREIGN FLOUR AND WHEAT.

Importations of wheat and wheat flour from other countries were as follows:

Year.	Wheat.	Wheat flour.
	Tons.	*Tons.*
1891	11,888	844
1892	11,694	938
1893	8,042	687

MONETARY AND SHIPPING FACILITIES.

Banks, public and private, are always ready to offer every facility within their sphere and power, and the rates of exchange are those usual with all such institutions; such facilities are always obtainable.

The chief obstacle to extending the trade is the want of direct communication, either by steamers or sailing vessels, between the United States and the ports of Nice, Cannes, or Mentone. These ports are accessible to vessels of good tonnage, but, as before mentioned, they rely upon coasting vessels from Marseilles and Genoa and rail communication with those cities and Havre. For this reason it becomes necessary to transship at these cities, which greatly adds to the cost. The cheapest way of sending wheat or flour from the United States to this district would be by charter of sailing vessels or by sending flour or wheat by some of the "tramp" steamers to complete their cargo.

TRADE OUTLOOK.

In cases of shipment of flour, I learn that the buyers here prefer it in bags of 50 and 100 kilograms each. As to obstacles in the way of extending the trade in American flour in my district, there are none whatever except those natural conditions dependent upon agricultural production here and the ability of American exporters to compete in price after paying transportation and duties. If our business men were represented on the various exchanges, either as a body or by their personal agents, so that they could quickly inform themselves of the varying conditions dependent upon demand and supply, I should feel much hope that their quick and ready enterprise would find room here for the development of their interests.

Considering the ability of our millers to produce the finest grades of flour, there is no reason why the market for American flour should not be extended. American high grades of flour at equal prices with those of other countries should meet with ready acceptance, but I should recommend that samples be put in the hands of brokers before making large consignments, at least until a steady demand had been secured.

WILBURN B. HALL,
Consul.

NICE, *January 19, 1894.*

RHEIMS.

USE OF WHEAT FLOUR IN FRANCE.

France, with a population of 37,000,000, is one of the largest, if not the largest, consumer of wheat flour in the world. The retail price of bread is uniform, being regulated each week by the association of bakers, who, through their president, notify officially the mayor of the city of the price adopted by them, so that the latter may, if necessary, enforce the price by closing the shop of the baker who should persist in a noncompliance with the official quotation. The baker is, moreover, obliged to furnish the exact weight of bread demanded, no approximation in this respect being allowed, except in the sale of fancy bread (*pain de luxe*), which is sold by the loaf weighing more or less (generally less) than the declared weight. But it is not only the quantity that the Frenchman wants, he also insists on the quality, be he a nobleman, bourgeois, laborer, or peasant. His bread must be pure white, with long crumbs (*longue mie**) and must not dry up too rapidly. Any flour which does not come up to these requirements will not find a market in France. Of all the privations endured during the memorable siege of Paris in 1870, the absence of white bread was the most keenly felt, and the recollection of this hardship is to this day the most vivid in the memory of the sufferers, who never fail to allude to the abominable quality of bread they had then to use, pointing to this sacrifice as an evidence of their patriotism. French people are, as a result of their education, experts in flour, and, if they can be pursuaded to buy foreign flour, none but the best will suit them.

The daily consumption of wheat flour in France is estimated at 545 grams (1 pound 3 ounces) per head, equivalent to 838 grams (1 pound 14 ounces) of wheat and to 735 grams (1 pound 10 ounces) of bread; the laboring class using as much as 704 grams (1 pound 9 ounces) of flour, equivalent to 1,080 grams (2 pounds 6 ounces) of wheat and to one kilogram (2 pounds 3 ounces) of bread. The daily ration furnished to the soldier is 750 grams (1 pound 11 ounces) of flour.

WHEAT PRODUCTION IN FRANCE.

The 7,000,000 hectares (17,290,000 acres) devoted to the cultivation of wheat in France produce on an average 108,000,000 hectoliters (306,471,600 bushels) per annum, and the consumption, including an amount used for seed is 120,000,000 hectoliters (340,524,000 bushels), that is, 12,000,000 hectoliters (34,052,400 bushels) less than enough to supply the demand. This average has not even been reached during the last three years, the crop not having yielded for that period more than 100,000,000 hectoliters (283,770,000 bushels) yearly. But this deficit is not the least trouble with which the French people are confronted; wheat-raising has been carried on at a great loss to the farmers. The cost of growing this staple has for some time past greatly exceeded its market value. It is estimated that the cost of raising wheat, including the rent of the ground, taxes, labor, manure, seed, etc., amounts to a minimum of 300 francs ($57.90) per hectare, equivalent to $23.44 per acre. As the average yield* is only 15 hectoliters (32½ bushels) per hectare, equivalent to 13.15 bushels per acre, the total cost to the farmer is 20 francs ($3.86) per hectoliter, equivalent to $1.36 per bushel. As the market price for this grain is actually 21 francs ($4.05) per hectoliter, and as it has been in the last few years as low as 15 francs ($2.89½) per hectoliter, or $1.02 per bushel, it follows that not only the farmer has made no profit, but that he has really lost money in the venture; and it must be remembered that these low prices have prevailed notwithstanding the scarcity of wheat in France, as a consequence of the large importation of foreign wheat with which the market has been glutted.

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*The French word "mie" is the name of the soft part of the bread as contradistinguished from the crust.

But, whatever may be the cause of the depression of the market and whatever may be the efforts to increase the production of wheat by the means of a larger outlay of money—say 400 francs ($77.20) instead of 300 francs ($57.90) per hectare, or $31.25 instead of $23.44 per acre, to raise the yield per hectare from 15 to 31 hectoliters (from 32½ to 87¾ bushels) and reduce its cost per hectoliter to 13 francs ($2.50)—nevertheless, it remains improbable that this result can be secured by the great majority of the small French wheat-growers, who, confronted by their loss of previous years, would naturally hesitate to try such a costly experiment, apt to produce fruitful results only when capital is used on large areas. The probability is that France will be compelled to import yearly an average of 10,000,000 hectoliters (28,377,000 bushels).

FRENCH IMPORTS OF AMERICAN WHEAT.

In the competition between the United States and other countries for supplying France with wheat the former has far outstripped her rivals, as appears from the following figures showing the quantity of wheat imported from the United States and other countries during the years 1890–'93:

From—	Year ending June—					
	1891.		1892.		1893.	
	Hectoliters.	*Bushels.*	*Hectoliters.*	*Bushels.*	*Hectoliters.*	*Bushels.*
United States	9,853,237	27,960,530	13,154,000	37,327,105	6,060,748	17,198,584
Other countries	433,276	1,229,507	692,588	1,965,356	354,868	1,070,008
Total	10,286,513	29,190,037	13,846,588	39,292,461	6,415,616	18,268,592

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*The average yield per hectare is: In England, 28 hectoliters (79¼ bushels); in Belgium and Holland, 27 hectoliters (77¾ bushels). The yield in France is lower than in Norway, Denmark, and Finland, and larger than in Roumania, Portugal, and Hungary.

The secret of our success lies in the fact, as I am informed by the prominent mill men of my district, that our wheat is not only of better quality, but is cleaner than the others. The wheat from other countries has to be subjected before it can be ground to a very expensive process of washing, requiring a special installation which most millers can not afford; and for this reason alone, independent of all others, our wheat would be given the preference even at an advanced cost of 30 cents per 100 kilograms (220 pounds).

We have therefore, under existing circumstances, a marked advantage over our competitors, an advantage which we can retain unless a discrimination should be made against us in the contemplated increase by the French Legislature of the actual tariff on foreign wheat (from 5 to 8 francs per 100 kilograms—96½ cents to $1.54 per 220 pounds). It appears probable that, to satisfy the demands of the farming element clamoring for the protection of agriculture, Parliament will grant the increase, which, in the opinion of several important millers of my district, would result in great loss to all.

STANDARD OF LIVING.

The standard of living in this district is high. In the cities meals are generally abundant and are composed of fresh meat, vegetables, cheese, fruits, and wine. The fare of the peasantry, if not as varied, is more abundant. A thick soup containing a large quantity of bread, potatoes, and vegetables constitutes their main dish. During week days they eat salt pork, but on Sundays and fête days they add fresh meat to their *menu*. Wine, also, is the beverage used at their meals.

AMERICAN FLOUR.

American flour is almost unknown to the population of this district, and the millers have no desire to encourage its introduction; in fact, they are opposed to the importation of flour, claiming that it contains such a great amount of bran that it is rendered black, makes a short crumb (*mie courte*), drying up very rapidly. They also complain that our exporters in their shipments fail to keep up a standard of quality in the same brands; but they are ready to confess that they dread the competition of American flour, realizing that its importation would cripple the business of their numerous mills, which more than supply the demand of the country. The difference, estimated at 25 per cent, between the freight on wheat and flour in favor of the latter is, they claim, more than offset by the value of the residues of wheat so much in demand for their domestic animals; and, last but not least, the conversion of grain into flour gives employment to a great many poor people, many of whom would be deprived of work should flour instead of wheat be imported. They are willing therefore to buy our wheat when the French crops are short, but they are prepared to make most strenuous efforts to prevent the importation of American flour.

KIND OF FLOUR USED.

The best quality of flour is most used in this district. The lower grades are chiefly exported to Belgium and other adjacent countries.

IMPORTATIONS OF FLOUR AND WHEAT.

The quantity of American wheat flour imported into this district from June 30, 1890, has been so small, if any at all has reached this market, that it can not be estimated.

From all the data I have been able to obtain from the eight departments forming this consular district, the population of which approximates 3,000,000, I can safely estimate at 125,000 hectoliters (353,750 bushels) the yearly importation of wheat from the United States; but the exact amount can not be given for each year, the largest importation having been made between June 30, 1891, and August 30, 1892, as the result of the short crop of that year. The great bulk of American wheat imported is the "Red Winter," with a certain amount of California wheat; but the latter grain, although of very fine appearance, produces, I am told, an inferior quality of flour, and for this reason is not as much in demand as the former.

Very little wheat flour has been imported from other countries. Occasionally some bargains can be obtained in Belgian flour; as a rule, no flour is imported.

The quantity of wheat imported from other countries has been, for the reasons above stated, very small compared with the amount furnished by the United States; in fact, judging from the best information that can be had, most all the wheat imported to this district came from America.

MONETARY AND SHIPPING FACILITIES.

The facilities for monetary exchange are very good. A number of private banks are scattered throughout this district, and the Bank of France and the Crédit Lyonnais have branch offices in all the principal cities. But, owing to the fact that all wheat has been purchased from importers and not direct from the United States, the settlements have been made with the importers, and no exchange has been bought on the United States for this purpose.

Dunkirk is the principal port through which our wheat is imported to this district, although some is received via Antwerp, Calais, Havre, and Rouen. From those ports the wheat is carried to the different parts of this district over canals, some little by rail.

OBSTACLES TO TRADE.

The obstacles in the way of the extension of trade in American flour are several, as above stated. The millers control the trade, and they have but one class of customers—the bakers. Homemade bread and pastry are very seldom seen in France, even in the rural districts. Bakers alone make bread. Housewives do not know how to make it, and have not at home the facilities for making it. The use of flour is consequently very limited in French homes and is bought only in very small quantities, a few cents' worth at a time, for the preparation of sauces.

The millers are organized and are a unit for the prevention of the extension of trade in American flour, and they will fight it with all the means at their command; and, unless sales of our flour can be made direct to the bakers, there would seem to be but little chance of success. The millers sell their flour direct to the bakers through their traveling agents, and if our millers wish to enter into competition, the only way is for them to do likewise and be represented here by capable agents provided with samples of their best flour and prepared to meet the criticisms and objections of the local millers and overcome the prejudices which the latter are apt to create in the minds of their customers.

Another and greater obstacle is the threatened new tariff on imported flour, which many ask to be made prohibitive.

PROSPECTS.

The prospects for doing a more extensive business in American flour are not at all flattering, but we can safely look forward to an increase of business in American wheat, which will be in direct ratio with the decrease ot the wheat crop in France. It has been estimated that we can lay our wheat in Havre for 14.08 francs per hectoliter of 80 kilograms (95 cents per bushel). If such is the case, is it reasonable to believe that through mere patriotism the Frenchman, who depends on bread as much as on air and light for sustaining life, will pay more for bread made with French flour than bread made with American flour and that bakers themselves will prefer trading with their countrymen than our dealers if in doing business with the latter they can secure the same quality of goods at reduced prices? American exporters must bear in mind that American flour is not known or is little known here. If they are ready to furnish a quality equal in all respects to the best grade of this country, they will, by well-directed efforts, triumph over the prejudices which the French millers have a great interest in keeping alive in the minds of their customers, in order to retain a monopoly which allows them to maintain their prices, even when wheat is selling below cost to the farmer. It would therefore seem that the sympathies of the customer would be assured to those who could and would supply him with good and cheap flour, the indispensable and most important article of food for the people of this country.

HENRY P. DU BELLET,
Consul.

RHEIMS, *January 22, 1894.*

ST. ETIENNE.

STANDARD OF LIVING.

The consumption of bread in France is perhaps greater than in any other country in Europe. That the consular district of St. Etienne is no exception to the rule, is attested by the number of bakeries within its limits. The general standard of living is about the same as in most large manufacturing towns. I find no preference expressed for American flour.

QUALITY OF FLOUR USED.

The quality used is in general the best, or first, quality, although what is known as "seconds" is in considerable demand among the laboring classes In many of the country districts rye flour is consumed in place of wheat flour.

FLOUR IMPORTS.

No American wheat flour was imported into this district during the years 1891–'93, for the reason that within the last few years flour mills have been pretty generally established throughout France, and consequently the French have been able to grind both the domestic and the imported wheat not only in sufficient quantities for their own consumption, but for export to Switzerland and Italy.

IMPORTS OF WHEAT.

It is very difficult to form an estimate for an inland consulate, and especially for each of the six departments composing the consular district of St. Etienne. The department of the Puy de Dôme, a very fertile section, produced during the period named sufficient wheat for its own use; the Haute Loire also raises sufficient wheat for home use, but in this latter department there is a large consumption of rye flour. The Loire, on the contrary, does not produce enough wheat for home consumption, and at one time imported largely from the United States and Russia.

One of the largest mill-owners of the district tells me that prior to 1893 about 9,200 tons of American wheat were brought into the department each year, but that last year no American wheat was purchased, Russian being preferred. My informant alleges as a reason for the preference that the Russian wheat contains more gluten. It might be added that just now in France the predilection for everything that is Russian is based upon a sentiment so widely spread and so deeply seated as to become no unimportant factor in any calculation of the probable "extension of markets" in this country. It should be noted in this connection that the inland millers do not import directly in any case; they get their wheat from large depots in Havre and Marseilles, chiefly from Marseilles.

At present Russia alone exports wheat to this district. It is estimated that she furnishes about 25 per cent of the total consumption.

EXCHANGE AND SHIPPING FACILITIES.

The principal banks in this district have correspondents in New York, so that exchange is rendered very easy and simple.

As a rule, the foreign wheat is brought to this district from Marseilles, which is the chief port of entry for transshipment of grain to the interior. The distance from Marseilles to St. Etienne by rail is 232 miles. The cost of transport to this city by rail is $3.48 per ton. For flour it would be about $5.75. The water way of the Rhône is sometimes resorted to, but, although in that way the cost is somewhat reduced, the transit is much slower; and, as the Rhône does not flow through this department, the cargo would have to be unloaded at a point 25 miles from here and then carried to St. Etienne by rail. For these reasons transshipment other than by railway is very exceptional.

OBSTACLES TO TRADE.

The main obstacles seem to be the customs duties and the cost of transport. The French claim that they can to-day import foreign wheat, grind it, and sell it at a lower price than that of imported flour.

TRADE OUTLOOK.

So far as this consular district is concerned, there is, in my opinion, little prospect of opening up a market for American flour.

CHARLES W. WHILEY, Jr.,
Consul.

St. Etienne, *January 29, 1894.*

GERMANY.*

The only obstacle to the extension of the trade in American flour in Germany is the rate of duty imposed; but, as no discrimination is made against American flour, this obstacle applies equally to all countries. At the present rate of duty the Germans can afford to import only the highest quality of flour.

The American flour which can reach this market at the present rate of duty will be compared with, and will at all times be judged by, the highest and best standard. Germany occupies a peculiar position geographically toward the grain and flour producing countries of the world, and that position enables her merchants to command the best of everything.

As it may puzzle our exporters to understand how the Germans can import only the finest quality of flour with profit, the following facts should be borne in mind:

The class whose financial circumstances permit them to make a choice of bread eat with their morning coffee, tea, or chocolate certain forms of wheat bread, known as "Hornschen," "Knuppel," and "Milchbrodchen." All first-class hotels, restaurants, eating houses, and homes are supplied by the bakers with these particular forms of wheaten bread.

It is claimed on all sides that the best "Hornschen," "Knuppel," and "Milchbrodchen" can be made only from the "auszugmehl" or the extra quality of imported flour. It is claimed that the finest quality of flour made by German millers is not fine enough to produce the best quality of these particular forms of bread.

Those who eat the particular forms of bread made from the finest imported flour are, of course, called upon to pay a heavier price therefor; hence the flour that produces such bread can be introduced with profit. As these forms of bread do not concern the masses, the importation of foreign flour must depend upon the fancy of the people who can eat what they like.

The bulk of the people of Germany eat rye bread only. For them wheat bread has little attraction, and they have no appreciation of corn bread. Hot bread of any kind is unknown in Germany; therefore, corn bread can never find a place among the German people. Even if they took a fancy to corn bread, it would be useless to appeal to them to adopt it, as they are without the means to supply milk, eggs, etc., the vital ingredients of all good corn bread.

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* Consular Agent Gädeke, of Königsberg, reports that no American flour or wheat is imported into his district; that eastern Prussia produces more grain than it consumes, and exports its surplus to western Germany and to foreign countries; and that the imports of grain from Russia are reëxported to western Europe.

BAKERS' ASSOCIATIONS.

It may interest American millers to know that in every city of any importance in the German Empire there is a bakers' association, which controls everything in the bread-baking line. There are few homes in any city in Germany where bread in any form is baked; the bakers supply nearly every household. Therefore, the American millers must establish pleasant relations with the bakers' associations throughout Germany if they desire to extend their business.

IMPORTS OF GRAIN AND FLOUR.

The following statement shows the origin and quantity of grain and flour imported into Germany during the month of November, 1893, and the eleven months ending November 30, 1893, in quantities of 100 kilograms:

Quantity of grain and flour imported into Germany during November, 1893, and eleven months ending November 30, 1893.

Whence imported.	Month of November, 1893.	Eleven months ending November 30, 1893.
Wheat.	*100 kilos.*	*100 kilos.*
Belgium	4,797	58,476
Bulgaria	17,901	174.836
Denmark	46	2,068
Great Britain	....	1,524
Netherlands	2,041	15,391
Austria-Hungary	27,256	220,206
Roumania	78,466	1,280,856
Russia	30,761	190,418
Servia	1,936	58,480
Turkey	....	34,074
British East Indies	2,181	25,815
Argentine Republic	123,623	1,419,810
British North America	....	32,268
Chile	4,611	35,482
United States	178,177	3,033.993
Australia	....	2
All other countries	2,107	15,629
Total	473,803	6,599,323
Total for preceding year	432,254	12,625,581
Rye.		
Belgium	6,857	50,942
Bulgaria	4,279	189.643
Denmark	15	3.569
France	5,788	55,240
Netherlands	663	26,181
Austria-Hungary	37	3,823
Portugal	....	158
Roumania	129,828	435,186
Russia	179,138	781,009
Servia	....	23,754
Turkey	15,568	193,541
British North America	....	2,151
United States	2,251	179,898
Total	344,424	1,945,600
Total for preceding year	127,652	5,303,185

Quantity of grain and flour imported into Germany during November, 1893, and eleven months ending November 30, 1893—Continued.

Whence imported.	Month of November, 1893.	Eleven months ending November 30, 1893.
Oats.	*100 kilos.*	*100 kilos.*
Bulgaria	1,285	10,882
Austria-Hungary	99,954	502,426
Roumania	249,252	569,641
Russia	6,849	83,270
Turkey	6,379	73,786
United States	102,682	384,397
All other countries	5,511	235,817
Total	561,512	1,860,219
Total for preceding year	96,779	791,504
Buckwheat.		
France	104	14,379
Netherlands	722	10,650
Russia	17,766	103,362
British North America	327	10,148
United States	735	43,784
All other countries	....	1,058
Total	19,654	186,381
Total for preceding year	33,166	246,689
Barley.		
Belgium	5,029	14,026
Bulgaria	1,622	127,089
Denmark	9,853	39,871
France	502	3,535
Netherlands	1,306	27,094
Austria-Hungary	512,773	3,370,067
Roumania	291,757	1,549,212
Russia	243,295	2,321,693
Servia	....	3,927
Turkey	1	14,506
United States	433	6,617
All other countries	1,754	8,916
Total	1,068,828	7,436,563
Total for preceding year	679,371	5,306,275
Maize and dari.		
Belgium	3,045	25,184
Bulgaria	70,286	397,278
Denmark	2	9,303
Netherlands	44	9,283
Austria-Hungary	22,616	228,390
Roumania	313,114	3,274,713
Russia	1,418	90,795
Servia	10,146	220,218
Turkey	13,659	225,304
Egypt	....	2,683
United States	239,946	2,448,008
Argentine Republic	5,097	129,118
All other countries	13	16,218
Total	679,386	7,076,495
Total for preceding year	333,007	6,801,487

Quantity of grain and flour imported into Germany during November, 1893, and eleven months ending November 30, 1893—Continued.

Whence imported.	Month of November, 1893.	Eleven months ending November 30, 1893.
Flour.	*100 kilos.*	*100 kilos.*
Belgium	386	4,117
Austria-Hungary	25,587	191,637
Russia	23	4,351
Servia	496	805
United States	4,743	36,840
All other countries	682	4,527
Total	31,917	242,277
Total for preceding year	23,802	238,780

W. H. EDWARDS,
Consul-General.

BERLIN, *January 20, 1894.*

BAMBERG.

STANDARD OF LIVING.

The standard of living in my district is about equal to the average that prevails throughout Germany. While in the Empire in general, and especially in southern Germany, the amount of rye flour consumed is considerably in excess of wheat flour, the demand for American wheat exists, based upon the fact that the difference in price between local and American wheat is very small. However, experience has demonstrated the fact that our wheat is imported in larger quantities only when the Bavarian crop is small.

QUALITY OF FLOUR CONSUMED.

Rye flour and middle grades of wheat flour are the qualities most generally used. The local market has proved to be best adapted for that grade of our wheat known as "Red Winter No. 1." There is no demand for the cheaper grades, as it is impossible for them to compete with local wheat. The price ordinarily paid here for good wheat is from 15 to 16 marks per 100 kilograms ($3.57 to $3.81 per 220 pounds) net.

Among so-called fancy grades, Hungarian wheat has almost exclusive control of the market.

IMPORTS OF FLOUR AND WHEAT.

No American wheat flour whatever was imported during the years 1891–'93.

Exact figures are not obtainable regarding the import of American wheat during the years 1891 and 1892, but the quantities as reliably estimated were, respectively, 800 and 850 cwts. In 1893 the import was increased, (approximately 1,200 cwts.), owing to the local conditions prevailing, before stated, as necessary causes for the import of the foreign product.

During the same period the quantities of wheat flour imported from other countries are hardly worthy of mention.

In 1891 and 1892 very little foreign wheat came to this district. For the year ending June 30, 1893, the import approximated 80 to 90 carloads (20,000 cwts.), principally by northern Germany, consisting for the greater part of Russian and also Hungarian wheat.

EXCHANGE AND SHIPPING FACILITIES.

The monetary and shipping facilities are the same which are offered by other larger German inland towns.

OBSTACLES TO TRADE.

The principal obstacles in the way of the extension of trade in American flour are: The customary use of rye flour (which has become almost a national characteristic), the fact of there being a local wheat crop, and the inland location of the district.

TRADE OUTLOOK.

The prospects for doing a more extensive business in American flour depend at present upon the manner in which the Bavarian wheat crop itself is, or is not, able to supply the demand. However, it is my opinion that the prospective removal of duties on some articles exported from Germany to America will result, among other advantages, in a more liberal demand for American flour (in competition with Russian and Hungarian flour) throughout the German Empire, especially in the neighborhood surrounding my district.

LOUIS STERN,
Commercial Agent.

BAMBERG, *February 7, 1894.*

BARMEN.

The extension of markets for American wheat flour is the subject of a circular issued by the Department of State dated December 5, 1893, and to such questions as I am called on to make answer I beg to submit:

(1) The standard of living is good among the people of this consular district, and they are ready to eat American flour.

(2) Medium grades of wheat and rye flour.

(13) Bankers' exchanges.

(14) Ocean, river, and rail routes combined.

(15) No obstacles exist.

(16) Good.

H. F. MERRITT,
Consul.

BARMEN, *January 25, 1894.*

DUSSELDORF.

STANDARD OF LIVING.

In this consular district the standard of living is good as compared with the standard in some other portions of this Empire. I am of the opinion that if American provisions of every kind were industriously and intelligently pushed into the markets of Germany this district, as well as all others, would share in the mutual benefit accruing to producer and consumer by reason of extended markets and less costly, but better, food. The people here are ready to eat bread and kindred food prepared from American or any other kind of flour, if such flour is good. No one ever asks where the flour comes from. The question is, is the food good?

QUALITY OF FLOUR USED.

Good rye and wheat flour are the only kinds used so far as I have been able to ascertain.

EXCHANGE AND SHIPPING FACILITIES.

The exchange facilities are those which usually exist between commercial countries.

From any seaport in the United States flour can be sent to this place by water. A transfer of freight from ocean vessels to the boats which do a carrying trade on the River Rhine can be made at Rotterdam. From other seaports on the Continent flour could be sent here by water or by rail.

P. LIEBER,
Consul.

DUSSELDORF, *January 29, 1894.*

FRANKFORT.

STANDARD OF LIVING.

The standard of living in this district is high in the cities, where the best of everything is required by the well-to-do people, who form a large proportion of the population; but in the smaller towns and villages, and especially among the farming and industrial classes, brown bread made of rye and the inferior grades of wheat flour is eaten almost exclusively, and all expenditures for food are regulated with the strictest economy. The people are ready to eat American flour when it conforms in quality to the standard grades of local origin and when it is as cheap and good as German flour of corresponding quality.

QUALITY OF FLOUR USED.

The flour used in this section is almost exclusively ground in this country, either from German wheat or a mixture of German with American or other imported wheat. The several standard grades of wheat flour are designated 0, 1, 2, 3, 4, and 5, of which 0 represents the highest quality. Rye flour is of two grades—0 and 1.

Brand 0 of wheat flour is used for making French rolls, pastry, and the finest qualities of bread. Brand 1 is used for tea bread (*Wasserweck*) and as an admixture with rye flour for making the first quality of brown bread. Brand 3 is also used for mixing with rye flour to make the best quality of brown bread. Brand 4 of wheat flour is mixed with brand 1 of rye flour to make the second quality of brown bread. Brand 5 of wheat flour is used as food for animals when grain is plenty and prices low; but when prices are high and times hard this lowest grade of flour is used in admixture with brand 1 of rye meal for making the coarse black bread, which is the staff of life to the German peasant and laborer.

Roller mills are in general use throughout southern and western Germany, and the production of brands 3 and 4 are relatively small—not enough in ordinary times to meet the demands of the market, which usually requires a larger proportion of the lower than the higher grades. It follows, therefore, that brands 3 and 4 are the qualities for which the import demand is often greatest, though for reasons to be hereinafter stated this is not the case at present. In years of profuse harvests northern Germany raises sufficient wheat to supply its own needs and sells its surplus to southern Germany; but in years of short crops, like the present, the deficit in the south and west is largely met by direct importations of wheat through Amsterdam, Rotterdam, and Antwerp, whence it comes up the Rhine in barges to Frankfort, Mayence, and Mannheim, which latter city, being the head of practical navigation on the river, is the controlling grain mart for a large district.

AMERICAN FLOUR IN GERMANY.

There are absolutely no statistics or records from which the quantity of American flour imported into the consular district of Frankfort during any specified year or period can be even approximately estimated. A consular district is a purely arbitrary division of territory, and separate statistics of import and export are not kept even by the governments of the several states which collectively form the German Empire. The statistics of the boards of trade at Frankfort and other principal cities show the amounts of wheat and flour received at and shipped from those points, but take no account of its origin, whether native or foreign. Thus the total arrivals of wheat at Frankfort by rail and river were 50,296 tons in 1891 and 52,326 tons in 1889, but there is no way by which it may now be ascertained what proportion of all this was imported or from what country it originally came. Statistics of imports which show the origin of the merchandise are kept only by the customs authorities and are collated by the imperial bureau of statistics at Berlin for the whole of Germany. Taking, therefore, the only official records which exist, we find that the imports of American flour into Germany during the past three years have been: In 1891, 436,770 pounds; in 1892 (estimated), 4,493,170 pounds; and in 1893, 9,231,860 pounds. The import of American flour, although still small in comparison with that of American wheat, is steadily increasing.

AMERICAN WHEAT IN GERMANY.

The quantity of American wheat imported into Germany during the same period was: In 1890, 51,988 metric tons; in 1891, 143,539 tons; in 1892, 630,213 tons; during the first ten months of 1893, 285,581 tons.

OTHER FOREIGN FLOUR IN GERMANY.

The wheat flour imported into Germany from countries other than the United States amounted in 1891 to 13,947.5 tons; in 1892, 26,620.2 tons; and during the first ten months of 1893, 17,826.3 tons.

GERMAN WHEAT IMPORTS.

The total German importations of wheat from all countries during the four years under consideration were as follows, the unit of weight being the metric ton of 1,000 kilograms (equal to 2,240 American pounds):

Countries.	1890.	1891.	1892.	1893 (10 months).
	Tons.	*Tons.*	*Tons.*	*Tons.*
Russia	370,823	515,863	257,294	15,965
Belgium	18,523	37,716	25,016	5,367
Bulgaria		1,176	53,472	15,693
France	4,774			
Denmark	3,305	971	4,497	202
Netherlands	21,041	27,739	8,620	1,335
Austria-Hungary	111,183	75,117	45,673	19,295
Roumania	61,800	42,852	91,785	120,239
Servia		6,630	13,539	5,564
Switzerland	2,725			
Turkey				3,047
British India		24,107	50,908	2,364
Argentine Republic		12,396	66,169	129,618
Chile		7,462	13,043	3,087
British America		1,268	11,719	3,226
Other countries	241,790			
Total	835,964	753,297	641,738	325,452
United States	51,988	143,539	630,213	285,581
Grand total	887,952	896,836	1,271,951	611,033

GERMAN DUTY ON AMERICAN FLOUR AND WHEAT.

Prior to the 1st of February, 1892, the duty on American wheat flour imported into Germany was at the standard rate of 10.50 marks per 100 kilograms (equivalent to $2.50 per 224 pounds), and the duty on American wheat was 5 marks per 100 kilograms ($1.19 per 224 pounds). But under the commercial treaty between the United States and Germany, which was concluded on the 30th of January, 1892, and took effect two days later, a long list of American products, including wheat and flour, were granted admission at the lowest rates of duty which are conceded to the "most-favored nations." Since that date the duty on American wheat and rye flour imported into Germany has been 7.50 marks per 100 kilograms ($1.78 per 224 pounds).

The present import duty on American wheat is 83 cents per 224 pounds, or $8.33 per metric ton of 2,240 pounds, equal to about 22.8 cents per bushel.

GERMAN DUTY ON FLOUR AND WHEAT NOT AMERICAN.

As to the duty on flour from other countries when imported into Germany there are three schedules, as follows:

(1) The lowest, $1.78 per 224 pounds, which is conceded to the most-favored nations, which are, besides the United States, the Argentine Republic, Belgium, Chile, Costa Rica, France, Great Britain, Hawaiian Islands, Italy, Liberia, Mexico, Netherlands, Austria-Hungary, Persia, Portugal, Roumania, Switzerland, Servia, Spain, Denmark, Greece, Sweden and Norway, Korea, Turkey, Dominican Republic, South African Republic, Zanzibar, Honduras, Kongo Free State, Canada, Guatemala, and Paraguay. All these most-favored nations enjoy their special privileges under commercial treaties which have been in many cases adopted for a specified number of years, and are therefore liable to be discontinued when they expire by limitation. There is at present in German politics a strong agrarian party which is opposed to such treaties, in so far as they apply to agricultural products; but, despite this influence, the treaties with Roumania and Spain have been recently renewed, with certain modifications. Only four of the nations in the most-favored class—Austria-Hungary, Roumania, Bulgaria, and the Argentine Republic—have any considerable export of cereals to Germany which competes seriously with the heavy imports from the United States.

(2) Brazil, Russia, and other countries not belonging to the most-favored class are subject to the standard duty of 10.50 marks ($2.50) per 224 pounds on flour when imported into Germany.

(3) Since the outbreak of the tariff war between Germany and Russia on the 1st of August, 1893, the duty on flour from the latter country has been increased 50 per cent, and is now 15.75 marks ($3.75) per 224 pounds.

The import duty on wheat from all nations in the most-favored class, including the United States, is 83.3 cents per 224 pounds; $1.19 per 224 pounds from all other countries, except Russia. It is $1.78 per 224 pounds when imported from Russia.

EXCHANGE FACILITIES.

The facilities for banking and exchange are as good in Frankfort as in any city of continental Europe. There are about two hundred banks in this city, of which all the principal ones have direct relations with New York and other leading American cities.

SHIPPING FACILITIES.

The facilities for shipping from American ports to Frankfort, Mayence, Mannheim, and Cologne are ample and excellent. There are regular lines of mail and freight steamers between Rotterdam, Amsterdam, and Antwerp and New York, Baltimore, and New Orleans. Sailing vessels also bring cargoes of wheat, though most of the business is done by steamers. The ordinary transit for freight coming by steamer from New York via Rotterdam to the Upper Rhine ports occupies from four to five weeks, the time varying somewhat with the existing stage of water in the river. With a fair stage of water the transshipment from steamer to river boat at Rotterdam and the trip to Frankfort or Mannheim occupy about three weeks. If the water is low and lighters have to be used, one week longer must be reckoned for the river route.

The rates of freight on the Rhine are also quite variable and are governed by the season, the stage of water, and the demand for vessels. The average rate for wheat is about $1.66 per last of 2 metric tons, or 4,480 pounds, and for flour 10 cents per bag of 100 kilograms (224 pounds) from Rotterdam to Mannheim, the rate to Frankfort being about 10 per cent higher than these figures. Transshipment from ship to river boat at Rotterdam costs about 25 cents per ton and insurance during river transit three-eighths to one-half of one per cent. The rates of freight from Antwerp and Amsterdam via the Rhine to Frankfort and Mannheim are from 25 to 50 cents per last higher than those above given from Rotterdam, which is the direct and natural entrepôt at the mouth of the river.

Owing to the protracted drought of last spring and summer, the present stage of water in the Rhine is low for this season of the year, and the freight rate on wheat from Rotterdam to Mannheim is now $2.38 per last, and $2.61 to Frankfort; but this will doubtless be reduced in February to $1.66 and $1.90, respectively. During the high water of March and April such freights are often as low as $1.20 and $1.25 per last. In general, the rate for flour may be reckoned at 25 cents per ton higher than that for wheat, for the apparent reason that flour is usually shipped only in small quantities, while vessels often bring entire cargoes of wheat in bulk.

TRADE OBSTACLES.

The principal obstacles which stand in the way of an important and permanent increase in the imports of American flour to this section of Germany may be summarized as follows:

(1) The import duty, which is relatively higher on flour than on wheat and favors to that extent the importation of the latter.

(2) The fact that bran, middlings, and the lower qualities of flour produced by the final grindings are always in strong demand, the two former as food for animals and the latter for making cheap brown bread. It is therefore more advantageous to import and grind wheat than to import flour for the local markets.

(3) The fact that German millers make the several grades or qualities of flour required by consumers more exactly than they can be imported. In 1892 there was a considerable import of American flour through certain commission houses in this region, but some of these shipments came from produce exchanges in the United States, and, being made up of the products of several different mills, were found to be variable in quality, two consecutive bags of the same lot being often quite different in grade. This caused complaints from dealers and bakers and injured somewhat the reputation of American flour. A leading commission merchant who suffered from this experience states that in future German importers will prefer to deal directly with millers in the United States, who can guaranty and preserve uniformity of quality.

(4) An obstacle to the importation of American flour is the fact that the high grades which are used in this country for rolls, pastry, and fine bread have long been imported to a greater or less extent from Hungary, and have therefore an established reputation. Southeastern Germany is largely supplied by such imports from Hungary; but, on account of high railway freights, American wheat and flour are at present cheaper for the whole Rhine Valley than Hungarian, and, as a matter of fact, the warehouses of this region are already stored with American wheat.

OUTLOOK FOR AMERICAN TRADE.

From the foregoing and all other trustworthy information that can be obtained, it would appear that, though under the conditions which now exist—cheap wheat and flour in America and a large deficit in Europe—the export of American flour to Germany may be considerably increased during the present season, the consensus of expert opinion is that such increase is likely to be to a great extent incidental and temporary.

Among the reasons which are assigned for this opinion is the fact that in Germany the scientific economy of all food products has been exhaustively studied, and the exact proportions of starch, gluten, and other elements which are required for the most advantageous bread-making have been precisely defined. Both dealers and bakers assert that American flour, which is usually made from one kind of wheat, is too "hard"—whatever that may mean—and does not bake well; and it is their opinion that such flour can not permanently compete with with German-made flour ground from a mixture of equal parts of German, American ("Kansas" or "Red Winter"), La Plata, and Russian or Roumanian wheat. Out of this standard mixture the German millers grind all the successive brands from 0 to 5, and on the grades thus produced the local standards of quality are based. This fastidiousness in respect to quality may be largely due to prejudice or selfish commercial interest, but the important fact is that these notions exist and must be taken into account as one of the chief obstacles to be met in the introduction on a large scale of American flour in Germany.

It should also be borne in mind that during the past five or six years great improvements have been made in the milling facilities of this country.

New mills have been built and old ones enlarged and equipped with automatic roller machinery and with screening and bolting apparatus of the most modern and highly improved types. As a consequence, the cost of milling has been greatly reduced. Grinding, which five years ago cost 40 cents per 100 kilograms, can now be done at a profit in some of the larger mills for 12 cents per 100 kilograms. Labor of all kinds is very cheap, and the German miller, though fully alive to the merits of American wheat, has become a hard man to beat on his own ground.

The conclusion is that, in respect to American wheat, the export trade to Germany is fully established, and as long as present prices continue will take care of itself.

The demand for American flour, although restricted by the circumstances above described, may be undoubtedly stimulated by enterprise and good management, and the coming six months would seem to offer an unusual opportunity for such an effort. The trade can be best worked through responsible commission merchants, of whom there are several in each of the principal cities of this region. The conditions upon which such consignments would be received are substantially the following, which have been found to work satisfactorily in the import of American wheat, it being remembered, however, that in importing flour the German merchants will prefer to deal directly with American mill-owners who export their own products.

STIPULATIONS.

Price in marks per 1,000 kilograms, including freight and insurance to port of destination named.

Reduction of weights on basis of 50¾ kilograms, equal to 112 pounds English.

Outturn guarantied in full.

Short weight must be claimed within a fortnight after the vessel has been discharged, and, if requested, a sworn weigher's certificate to be furnished.

Quantity to be within 5 per cent at seller's option, and the unit to be 480 pounds English.

Policy of insurance to be given for 2 per cent over invoice amount.

Shipment to be made by steamer or steamers, with option to call at any intermediate port or ports.

Port of shipment, New York, Baltimore, Newport News, or Philadelphia.

Official seaboard or western certificate to be final as regards quality and condition. An affidavit should be furnished only if the quantity of the western certificate exceeds the quantity shipped under this contract.

Payment to be made by seller's check at sight direct on buyers, with documents attached, less 5 per cent discount for sixty days.

Arbitration of any dispute to be held at London, according to the rules established for the American grain-shipping business, excepting where such rules conflict with the foregoing stipulations of this contract.

Finally, it is worthy of note that there is throughout southern Germany a general scarcity of food grains for cattle, horses, and sheep, and this, added to the lack and high prices of hay and straw caused by the drought of the past year, has already produced a demand for the import of bran and shorts, as well as oats and corn. If bran can be compressed so as to save bulk on shipboard, and can in that state be exported and arrive sweet and in good condition, a large export to this country can certainly be developed during the coming six months. The practice of feeding stock of all kinds with bran and middlings, usually mixed with chopped hay or straw, is very general in Germany, and it is this which makes the demand for such products so constant and so profitable to German millers.

FRANK H. MASON,
Consul-General.

FRANKFORT, *January 4, 1894.*

GRAND DUCHY OF LUXEMBURG.

IMPORTS OF FLOUR AND WHEAT.

No American flour is imported into the Grand Duchy of Luxemburg, owing to the high import duty. For the same reason very little foreign flour of any sort is used.

As Luxemburg, though it is an independent country, is a member of the German customs union, considerable quantities of flour are imported free of duty from Dantzic, Königsberg, and other places in northern Germany. The flour most used in Luxemburg is manufactured here from a mixture of domestic and Danubian or American grain.

The entire quantity of wheat flour imported was:

From—	1891.	1892.
Belgium......tons...	23	18
Austria......pounds...	....	436
France......do.....	....	1,111

During 1891 no American wheat was imported. In 1892 the importations of American wheat amounted to about 348 tons, and in 1893 to about 2,420 tons. The imports of wheat other than American were as follows:

Kinds.	1891.	1892.
	Tons.	*Tons.*
Belgian	2,551	8,692
French	19	....
Roumanian	....	788
Servian	....	33
Russian	....	388
Chilean	....	11
Egyptian	....	133

EXCHANGE FACILITIES.

The facilities for monetary exchange depend, necessarily, in a general way upon the fluctuating conditions of the market. The International Bank, in the city of Luxemburg, is an extensive and reliable concern. There are also several other banking establishments in the Grand Duchy.

AMERICAN WHEAT.

While in most of the other states which are members of the German customs union the chief bread flour is rye, in the Grand Duchy of Luxemburg nearly all bread consists wholly or chiefly of wheat flour. It therefore appears that no part of the German customs territory offers a better market for American wheat than does the Grand Duchy of Luxemburg. Naturally, though, the capacity of this market is not large, as the Grand Duchy has only 215,000 inhabitants.

The increased importation of American wheat during the past three years is very encouraging, and the unusually friendly feeling toward our country which permeates all classes here seems to justify the belief that the commercial relations now existing between the United States and the Grand Duchy of Luxemburg can and will be considerably extended in the near future.

SHIPPING FACILITIES.

The facilities for shipping are very good, there being direct railway connection with Antwerp, between which port and New York the steamers of the Red Star line ply semiweekly. There are also several sailing every month from Philadelphia to Antwerp.

The high German duty apparently renders impossible the importation of American flour into the Grand Duchy of Luxemburg, but there seems to be room in Luxemburg mills for American wheat.

GEORGE H. MURPHY,
Vice-Commercial Agent.

LUXEMBURG, *January 20, 1894.*

GLAUCHAU.

STANDARD OF LIVING.

In the consular district of Glauchau, Saxony, and the neighboring cities and villages there is a large element of factory hands, weavers, miners, etc., whose standard of living is best expressed as fair.

AN OPENING FOR AMERICAN WHEAT AND FLOUR.

To this class of people the cheaper brands of flour must be supplied. Among the better classes the bread most used is made from a brand of wheat flour called "Kaiserauszug," which is of superior quality. The poorer classes, comprising the factory hands, weavers, and others, use very little wheat flour, but employ the cheaper kinds of grain—corn and oats. Here would seem to be an opportunity to introduce a cheap brand of American wheat flour that would meet the requirements of the laboring people and come within their ability to purchase.

The forwarding agents state that little or no grain is imported into this district from the United States, the sources of supply being Russia, Hungary, and Roumania, from which it is imported direct by rail. The cost of transportation is small.

That American wheat is not handled in this district is due to the fact that it has never been properly introduced, and not from any unwillingness to receive it.

Considering that there is a population of about 300,000 in this district, of which the majority are working people, the introduction of a cheap brand of American wheat flour could be readily effected and a market created for our exportations, with promise of extensive trade in American grain and flour in the future.

SHIPPING FACILITIES.

Hamburg and Bremen, the seaports of this district, are in almost direct communication via Leipsic. The facilities for transportation by rail are of the best. The facilities, also, for shipping from the United States to these seaports put this district in easy reach of the grain trade.

EXCHANGE FACILITIES.

The facilities for monetary exchange being also very good, render the prospects of doing a large business, as far as transportation is concerned, very promising.

OBSTACLES TO TRADE.

There are obstacles in the way, however, in the rate of ocean freight and the competition with Russia and Bohemia. The Russian grain trade in this country is already extensive, and, should the Russo-German commercial treaty be concluded, Russia will continue to supply a large portion of the demands.

The grain trade here is handled principally by wholesale firms, and if our wheat could be introduced to these purveyors and handled by them it would find the people ready to become consumers. At present, owing to the extensive trade in Russian wheat, the ready market would be difficult to acquire; but if American wheat can be transported at a cost to rival the Russian and Austrian importation, American products ought not to suffer in the competition. The question has now somewhat of a political aspect, the outcome depending on the rejection or conclusion of the commercial treaty with Russia, which is supported by the commercial policy of the Government, but strongly opposed by the Agrarian League, representing the agricultural interest of the Empire. Should this treaty be rejected, our grain and flour will not have so much to contend with in acquiring a market.

GEORGE SAWTER,

GLAUCHAU, *January 6, 1894.* *Commercial Agent.*

HANOVER.

So far as regards the mere letter of the circular, I might content myself with the bare statement that, until there is a decided modification of the German tariff, there is in this market no chance for American wheat flour as distinguished from the grain. The duty on 100 kilograms (220.5 pounds) of flour is 7.30 marks ($1.74), while that on the same weight of wheat is only 3.50 marks (83 cents).

It may be worth while, however, to add that the German millers often buy American wheat to mix with the home product in proportions running up to 50 per cent, with a view to making a lighter bread. For some reason yeast is more active in flour made from American wheat. Bakers want bulk, and their customers do not object to it, for to them it is lightness.

It might be well to inquire whether there is not an opening for American trade in rye, especially if the present negotiations between Germany and Russia relative to tariff reprisals prove unfruitful. Upon this point I have no information that will warrant more than a suggestion.

E. P. CRANE,
Consul.

HANOVER, *January 4, 1894.*

MAGDEBURG.

STANDARD OF LIVING.

The province of Saxony being probably the richest province in Prussia, the standard of living in my district is advanced. The farmers are well to do, and laborers find steady employment. The people are ready to consume American flour.

QUALITY OF FLOUR USED.

The flour most used in this district is, of course, rye flour. Of wheat flour a middling quality is favored made entirely of German wheat. To produce a finer quality a brand called "Kaiserauszugsmehl" (German wheat) is mixed with American Red Winter No. 2, or other suitable wheat, mostly Russian, in the proportion of one-sixth to one-third American or Russian and the remainder German. This latter brand, it is claimed, equals our patent wheat flour and answers all purposes for home consumption, and is from 3 to 4 marks (71.4 to 94.2 cents) cheaper per 100 kilograms (220 pounds) than the American product. For extraordinarily fine wares bakers use a flour made in Austria. German wheat makes as white a flour as our wheat, but it does not contain so much gluten. To supplement this gluten in the finer qualities our wheat is preferred to Russian.

IMPORTS OF FLOUR AND WHEAT.

The quantity of American wheat flour imported into this district is only nominal. In 1893 it may have been about 2,000 bags and in the preceding years certainly not more.

In spite of diligent inquiries at the chamber of commerce, prominent dealers, and shipping houses, I have been unable to ascertain even approximate data in reference to the quantity of wheat imported into my district during 1891, 1892, and 1893. No statistics are kept in Magdeburg of incoming and outgoing merchandise, and I could not find anybody who would undertake to make an estimate.

The quantity of wheat flour imported from other countries into my district during 1891, 1892, and 1893 was nominal also.

EXCHANGE AND SHIPPING FACILITIES.

This being a large farming, mercantile, and manufacturing community, the facilities for monetary exchange are all that can be desired.

The facilities for shipping from the United States are the best possible. The goods can be loaded at Hamburg from the ocean steamers directly into barges and tugged up the River Elbe, which flows through the province of Saxony.

OBSTACLES TO TRADE.

The obstacles in the way of the extension of trade in American wheat flour are twofold—first, the preference of the population for rye, and, second, the price of the wheat flour. No fault is found with the flour itself. Against the preference it is impossible to fight. The German laborer, farmer, and even the better classes prefer rye bread to wheat bread, even when the latter is cheaper, as it was in 1891.

The price of our flour, or rather the duty on the same, is the second great obstacle. While the duty on our wheat under the favored-nation clause is 3.50 marks per 100 kilograms (83 cents per 220 pounds) the duty on flour is 7.30 marks ($1.74), thus discriminating against the manufactured article in favor of the raw.

I have been credibly informed, however, that a second quality of our wheat flour could be readily disposed of at the seaports, principally Hamburg and Bremen, not for German consumption, but for supplying outgoing ships. This flour could be stored in the Freihafen district, thus escaping taxation, and taken out for export when needed. This market should be in our hands.

The prospects of doing a more extensive business inland are, from my observations, not very bright. As before mentioned, the Germans do not as a rule appreciate a fine, high-grade, patent wheat flour, and the duty is against us. Other nations are, of course, similarly situated, and it is therefore not a matter of foreign competition.

There are two matters now under consideration by the German Government—the commercial treaty with Russia and the abolition of the proof of identity (*Identitaets-Nachweis*)—which, if passed, might bear on our exports.

Wheat, when once imported, can not be exported again and the duty remitted, unless the identity of the imported and exported grain is proven. This, in an article such as wheat, is very difficult and generally impossible to do; hence the actual working of the clause has been that wheat, when once imported, remained here for consumption, and, when followed by abundant domestic crops, glutted the market and depressed prices to the disadvantage of the farmer and the dealer. With the flour the identity clause was partly inoperative. A mill working both foreign and domestic wheat had the privilege of exporting or selling for export about 60 per cent of flour made from the imported quantity and was remitted a corresponding amount of the duty paid, without, however, being obliged to prove that the flour to be exported was made solely, or even partly, from the imported article. In other words, they could export flour made entirely of German wheat and collect a drawback from the Government if they proved that a corresponding amount of imported grain had gone into their mill.

The abolition of this identity clause, which is at present only intended for the grain, will no doubt stimulate imports in cereals, because the dealers need not fear being handicapped by an accumulation in the markets, but can in such case export again to other places any part of their imports and collect a drawback on the same from the Government. It is claimed by men in the business that after the abolition of the identity clause as to grain has demonstrated its usefulness its scope would naturally be extended to flour also.

JULIUS MUTH,
Consul.

MAGDEBURG, *January 27, 1894.*

MANNHEIM.

Wheat flour is generally used in Baden, especially in this district. The people are inclined to eat American wheat flour.

A good middle quality of flour is most in use.

The quantity of American wheat flour imported into this district during the three years ending June 30, 1893, was:

	Kilograms.
1891	700,000
1892	1,000,000
1893	600,000

The quantity of American wheat imported during the same period was:

	Kilograms.
1891	100,000,000
1892	100,000,000
1893	115,000,000

Besides American wheat flour, only very small quantities of foreign flour have been used during the years 1891, 1892, and 1893—about 100,000 kilograms altogether, which came from Hungary.

The quantity of wheat imported from countries other than the United States during the same period was:

	Kilograms.
1891	100,000,000
1892	100,000,000
1893	115,000,000

This came from La Plata, Roumania, Servia, Bulgaria, India, Turkey, and Russia.

The manner of buying and paying is either sixty days' bank credit or cash.

The shipping facilities are very good. The goods can be shipped from the United States to Rotterdam or Antwerp, and thence on the Rhine to this city.

MAX GOLDFINGER,
Consul.

MANNHEIM, *January 13, 1894.*

MAYENCE.

STANDARD OF LIVING.

The standard of living in this consular district is, on the whole, fair to high. The people live well—as well, I believe, as anywhere in Germany. They can not be said to be ready to buy American flour, though consuming, no doubt, a good quantity of flour from American wheat ground in Germany. They are not opposed to American wheat flour as American, but will eat it as quickly as any other if they can get it as good and as cheap.

QUALITY OF FLOUR CONSUMED.

The quality of wheat flour used in Germany by the well to do is claimed to be superior to the American article; but there is a great deal of bread of mixed flours eaten by all classes, especially by the middle and lower orders of the people, made up of rye flour mixed with wheat flour of low grade. Rye is the staple breadstuff in Germany, though wheat is coming more and more into popular favor, particularly in combination with rye. In southern Germany rye bread is now, I understand, seldom met with unmixed, some wheat flour being as a rule added. But the people, I am inclined to think, will not be swerved from their loyalty to rye for many generations, except through bad harvests in Russia, which is the great rye granary for Germany, or through tariff wars with that Empire, making this cereal high in price. They are remarkably strong in their attachment to rye bread, and condemn wheat as a steady diet. They will eat rye bread in preference to wheat bread even when they can get the latter as easily as the former.

The quality of wheat flour most in use is ordinary.

AMERICAN FLOUR AND WHEAT.

I do not believe, as the result of the inquiries I have made, that any American wheat flour is imported into this consular district or has been in the years mentioned. In all Germany the total amount of "flour from grain, etc.," imported from the United States during the year 1892 seems, according to the statistics of the country, to have been only 2,904,000 pounds, or about one-twentieth of a pound to each head of the population. With even these small figures, however, the United States are excelled in flours exported to Germany by only one country—Austria-Hungary, which shipped to Germany in the year under consideration 49,579,200 pounds of flour of all kinds, or about seventeen times as much as the United States.

What amount of wheat was imported into this district during the years in question, I can not say. It was, however, considerable. From the custom-house here I have been unable to get figures, as it responds to my request for them that they are in the hands of the officials at Berlin. The statistics of the Empire for 1892 show 630,213 tons (2,200 pounds to the ton) of wheat imported into Germany direct from the United States during that year, or more than from any other single country; and 1,296,213 tons altogether, thus making the United States the contributor of a trifle less than one-half of the aggregate importation. More than one-half, however, no doubt came from the United States. Reckoning 2,200 pounds to the German ton and 60 pounds to the bushel of wheat, the quantity of wheat acknowledged to have come from the United States in 1892 was 23,107,810 bushels, and the quantity from all countries 47,527,810 bushels.

I doubt whether any American wheat flour at all was imported into this district during the years named.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are as good as they are anywhere. The facilities for shipping from the United States to Mayence are good—to Antwerp or Rotterdam by vessel and thence by iron barges up the Rhine.

OBSTACLES TO TRADE.

The obstacles in the way of the extension of trade in American flour in Germany are the customs duty and the belief that the high grades of American flour are inferior in quality to the corresponding grades of Germany. The Germans consider their best wheat flour superior to the American, but inferior to that of Austria-Hungary; and, as the flour of Austria-Hungary is largely shut out of the German market by the German duty, there is little show for the American. It seems to be thought, however, that the lower grades of American flour might go with a little pushing.

One objection made to American flour is that it is shipped in barrels, against which there is a prejudice. I believe flour is never barreled in Germany.

A German miller in this district, who some fifteen or twenty years ago worked at milling in Chicago, maintains that German wheat flour is superior to American, because the millers in Germany make less fine flour out of the same quantity of wheat, as the low grades of flour in Germany can be more readily disposed of for mixing with rye in bread-making. There being little rye bread eaten in America, the manufacturers of wheat flour there are of necessity obliged to make more fine flour out of a given quantity of wheat, thus lowering the general quality of their output as a food. The mode of milling in Germany is different from that in vogue in America. It was formerly very inferior to that prevailing in England and the United States, but in the last twenty years or so great improvements have taken place in milling machinery and in the method of milling. The small mills run by wind or water have been supplanted to a considerable extent by large mills worked by steam. What is known as high milling rules in Germany, while flat milling is said to characterize the United States; and they differ, I am told, in this, that the German seeks quality rather than quantity, while the American aims at quantity. In Germany the wheat is ground coarsely at first, three or four times, into groats or grits, from which every particle of bran is cleaned away by machinery, and then is ground into flour by porcelain rollers. The first or best grade of flour is marked Imperial, the second No. 00, the third No. 0, the fourth No. I, and the fifth No. II, the two grades last named being generally used for mixing with rye flour in bread-making. In southern Germany the best grade of flour is generally marked No. 0, the second No. I, the third No. II, etc. In Germany only 12 per cent of the whole output is of the best grade, 25 per cent of it is of the second, and 20 per cent of the third. The wheat used in Germany and the United States is of like quality, and immense quantities of American wheat are ground up into flour in Germany, so much so that the Germans want to know what it would profit them to import American flour when they can import the wheat itself and grind it up to their liking.

The miller to whom I have referred says that there is no obstacle, in his opinion, in the way of the introduction and sale of American wheat flour in Germany except the inferiority of the flour itself. If the American flouring mills will compete in Germany with as good a product as the German mills turn out, they can find a market.

The German mills are for the most part small, and there are a multitude of them, I believe, run by three or four hands each. Such extensive establishments as are met with in the United States are unknown here, and there seem to be no generally recognized brands of flour, as in the United States. When you want flour you have to buy it blind and ask your grocer or local miller for his best article, which seems not to be always the same thing. The American housewife in Germany does not like the German flour, and thinks it quite inferior to the American flour for fine baking. It may be that the German flour is more nutritious, but it does not make up as well.

I know of no large mills in my district.

TRADE OUTLOOK.

The prospects at present for doing business in American flour in Germany I consider poor for the reasons above cited.

In conclusion, I have to say that I have been writing on hearsay, and not as an expert; and the statements I have made may not be strictly correct. The trade in the United States, however, will be able to judge from the general tenor of the report whether the statements made as to the flours of the two countries are probably true or not.

JAMES H. SMITH,
Commercial Agent.

MAYENCE, *January 27, 1894.*

MUNICH.

QUALITY OF FLOUR CONSUMED.

Of breadstuffs, wheat flour is the most used in this district. Formerly rye bread formed the great bulk of that consumed; but the difference in price between rye flour and the inferior grades of wheat flour being small, the latter appears to be preferred and is more extensively used, at least in this immediate section.

There is no objection to American wheat flour, provided it can compete in price with that obtained here and with that imported from neighboring countries.

Wheat flour is roughly classed as 0, 1, and 2, the last, an inferior quality, being that most used.

AMERICAN FLOUR AND WHEAT.

I can learn of no American wheat flour having been imported here during the years 1891, 1892, or 1893, and it is very probable that if any was imported the amount was small.

In giving the amount of wheat and wheat flour imported from other countries into this district, it must not be inferred that these amounts are consumed here; on the contrary, this section, being largely devoted to agriculture, produces nearly enough wheat for its own need, and wheat and wheat flour, almost to the extent imported, is distributed over the Empire. I give in the following statement the amount of wheat and wheat flour imported into Oberbayern, Schwaben, and Newberg during 1892, that being at this date the only year for which I can obtain accurate information:

	Bushels.
Austria-Hungary	183,029.36
Servia and Roumania	414,110.76
Russia	14,681.33
America	366.66

The quantity of wheat flour imported in 1892 was 1,694,000 pounds, from Austria-Hungary.

I regret that I can obtain only partial information of the amount imported by Niderbayern during the same year. There arrived in Passau, via the Danube, 15,276 tons of imported wheat and 1,491 tons of flour. It is probable that the great bulk of this came from Austria-Hungary, Servia, and Roumania, and that as much more was received by railroad from the same countries.

FACILITIES FOR EXCHANGE.

Munich being an important capital of fully 380,000 inhabitants, the facilities for monetary exchange are good.

OBSTACLES TO TRADE.

In considering the question of profitably importing American wheat and American wheat flour directly into this district, it should be remembered that this is an agricultural section and annually produces a large amount of wheat; that this district adjoins Austria-Hungary, one of the best wheat-producing countries in Europe; and that Munich is far inland, remote from the ports of Bremen and Hamburg, and connected with these distant cities only by rail. The freight rate between Munich and Bremen in lots of 10,000 kilograms is 4.66 marks ($1.11) per 100 kilograms (220 pounds).

RALPH STEINER,
Consul.

MUNICH, *January 25, 1894.*

NUREMBERG.

STANDARD OF LIVING.

The principal food in the Kingdom of Bavaria is bread, and, of the cereals cultivated for this purpose, rye stands foremost; next to it comes wheat. Especially in Lower and Upper Bavaria, two of the most fertile provinces of the eight of this Kingdom, a large quantity of wheat is grown.

The official statistics of Bavaria show that of the twelve years 1880–'92 it was the year 1892 which had the best crop, whereas the year 1888 had the poorest, both in quantity and quality. In 1892 wheat yielded 32.3 zentners* of grain per hectare;† in 1888 it yielded 24.7 zentners.

The crop area of wheat varies but little. In 1892 it was 322,452 hectares; in 1891, 324,437 hectares. In 1892 the wheat crop yielded 10,411,878 zentners of cleaned grain; in 1891, 8,070,105 zentners.

In the year 1892 the average weight of a hectoliter (2 bushels 3.35 pecks) of cleaned wheat was 152 pounds (167.2 pounds American); in the year 1891 it was 149 pounds (163.9 pounds American).

The 1893 crop may likewise be called a good one. Although during the summer the prospects, owing to the prolonged and excessive heat, were very bad, yet the more favorable weather of the autumn brought a good harvest.

Bavaria's production of wheat is, however, not sufficient for its own wants, and it has therefore to turn to other countries to meet the deficiency.

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*1 zentner = 110 American pounds.

†1 hectare = 2.469 acres.

This is mainly effected by the importation of wheat and wheat flour from Austria-Hungary and Roumania, and, of late, the La Plata.

ARE THE PEOPLE READY TO EAT AMERICAN FLOUR.

There has been an inclination to use American wheat flour. I am informed that various efforts to introduce it in Bavaria were made previous to the year 1881. However, these efforts met with no success, the quality, as well as the manner of grinding, of the American flour not answering the requirements of the Bavarian bakers, who, accustomed to the different qualities of Bavarian and Hungarian flour, could not get on with the American product in their method of baking.

In the year 1881 the import duty on flour was raised to 3 marks per 100 kilograms (71 cents per 220 American pounds), which put great difficulties in the way of importing this article; but the fresh increase of the duty to 7.50 marks per 100 kilograms in 1885 and to 10.50 marks in 1887 practically put a stop to it.

QUANTITY OF AMERICAN WHEAT FLOUR AND WHEAT IMPORTED.

The aforementioned duty of 10.50 marks is still in force, and, although it has been reduced since 1892 to 7.30 marks per 100 kilograms on American flour ($1.74 per 220 American pounds)—the United States, as one of the most-favored nations, enjoying the privilege of a reduction on the general tariff—yet it is hardly probable that American wheat flour has been imported from July 1, 1890 (or even, as far as I have been able to learn, since 1881) up to the present time.

American wheat has been and is still imported in considerable quantities. This is mainly due to the fact that the duty on wheat is low as compared with that on flour. Wheat pays only 3.50 marks per 100 kilograms (83.3 cents per 220 American pounds). It is evident that Germany desired thus to create a most efficient system of protection for its own mills. It is, however, impossible to obtain an estimate as to the quantities of American wheat imported into Bavaria, as direct importations have hardly been made, but nearly all through Mannheim houses. Mannheim, I hear, has been the principal market for American wheat and wheat flour for southern Germany, including the Kingdom of Bavaria. This is caused by the fact that all shipments from the United States to Bavaria must go via Rotterdam or Antwerp up the Rhine to Mannheim, this being the shortest and cheapest route from the United States to Bavaria. In the city of Mannheim are those large grain-importing firms who sell these cereals to the millers and dealers in Bavaria.

QUANTITY OF WHEAT FLOUR AND WHEAT IMPORTED FROM OTHER COUNTRIES.

The quantity of wheat flour imported from other countries into Bavaria during the years 1885 and 1890 are said to have averaged 3,400 tons (one ton = 2,204.6 American pounds) per annum, coming mainly from Austria-Hungary; in the year 1891, 6,000 tons, and a like quantity in the year 1892.

The imports of wheat during the years 1885 and 1890 have averaged 37,000 tons per annum; in 1891, 28,000 tons, and a like quantity in 1892.

OBSTACLES TO TRADE.

Obstacles in the way of extending the trade in American flour are: (1) The high duty; (2) the excellent crops of recent years, together with the large quantities of wheat flour imported from Austria-Hungary, by which the market became overstocked and prices depressed; and (3) the preference which, until now, has been given to home-grown and Hungarian flour as long as there was an abundance of such.

PROSPECTS.

An improvement in the importation of American wheat flour would take place if the crops of Bavaria and Austria-Hungary should happen to be less plentiful, and if the United States would send over only the best and finest grades, which are the most used here, as the quality of American flour imported in former years could not compete with the excellent quality of the Hungarian flour.

Nuremberg, through its central location in this Kingdom, would no doubt be a good starting point for any fresh experiments concerning the importation of wheat flour into Bavaria, whether by establishing agencies or by making consignments to leading firms. One of the largest flour firms in Bavaria is the firm Gebrüder Soldan, in Nuremberg, to whom, in a great way, I am indebted for the information contained in this report.

SIGMUND DUNKELSBÜHLER,
Vice and Deputy Consul.

NUREMBERG, *January 25, 1894.*

PLAUEN.

STANDARD OF LIVING.

The upper classes of this district live well and are prepared to eat the best flour they can get. The lower classes have for years eaten nothing but rye bread, the best of which is made by mixing a little wheat flour with the rye; wheat bread is considered by them a luxury.

FLOUR MOST USED.

Hungarian wheat flour is the most popular with the bakers for all fine bread and pastry.

IMPORTS OF AMERICAN FLOUR AND WHEAT.

I regret that it is impossible for me to obtain any accurate information on these heads. I learn from the dealers in flour that during the last few weeks a small quantity of American flour was sent into this district to be distributed among the bakers. The opinions expressed about this flour are most favorable, as it is lower in price and of better quality than the Hungarian. This, as the commission man from whom I have gathered my information remarked, "is saying a good deal, as the German flour market has never been as low as it is at this moment." Thus if American flour can compete on a low German market it can certainly do better on an average one.

It appears, then, that all that is required to introduce the American flour to the bakers of this district is activity among our flour-mill owners, who should be in the field with their product as soon as possible, in order to hold the favorable opinion of the consumers.

It is impossible for me to tell what amount of American wheat is marketed in this district, as the grain comes through the hands of brokers in Hamburg and Bremen, and is by them delivered to the local mills.

EXCHANGE FACILITIES.

Drafts on London or the United States are readily given by any of the local banks, who generally have correspondents in the United States or London.

OBSTACLES TO TRADE.

I know of none at present, and, unless the duty is raised this year to protect the farming interest of the country, who are clamoring for an increase of duty on farm products, there can be none.

TRADE OUTLOOK.

The prospect for American flour, from what I gather from the handlers, is good. If the American millers will unite for the purpose of export, appoint competent agents in the principal cities of Germany, who will have subagents in the local towns, all working for the same end, sending nothing but the best flour and at prices as low as is consistent with profit, there can be but one result—the success of American flour.

T. W. PETERS,
Commercial Agent.

PLAUEN, *January 20, 1894.*

STETTIN.

STANDARD OF LIVING.

The standard article of consumption in this district is rye flour. The quality used is mostly rye flour mixed with low-grade wheat flour. The fine quality of wheat flour is eaten only by a limited class of foreigners and wealthy people living mostly in the cities.

IMPORTS OF FLOUR AND WHEAT.

In 1891 there was no import of American flour into this district; in 1892 three-tenths of a ton was imported for sample purposes; in 1893 a considerable increase is shown, as there were 114,500 pounds imported.

In 1891, owing to the heavy droughts and failures in grain, 601,769 bushels of wheat were imported into Stettin from the United States; in 1892, 59,230 bushels; and in 1893, owing to the abundant harvests of Pomerania, only 15,911 bushels.

The following is a table of the flour imports from other countries:

Countries.	1891.	1892.
	Tons.	*Tons.*
Denmark	0.1	0.8
England	3.6	8.3
Norway	0.2	....
Russia	11.7	6.3
Sweden	....	0.1

Statistics for 1893 are not yet published. The imports that year were about the same as those for 1892.

The wheat imports from other countries than the United States were as follows:

Countries.	1891.	1892.
	Tons.	*Tons.*
Belgium	0.1	5,669.7
Denmark	12.9	1,063.1
England	26.4	0.4
Russia	25,665.8	....
Sweden	13.8	14.1
Turkey	....	1,286.4
Netherlands	....	211.3

There was but a slight difference in the imports of wheat in 1893 as compared with 1892.

SHIPPING FACILITIES.

Stettin has excellent shipping facilities. It has two direct lines of ocean steamers—the Hamburg-American and Thingvalla lines. These companies have four and five steamers, respectively, plying between Stettin and New York. There are also numbers of sailing vessels engaged in this trade.

The freight per ton by steamers from New York to Stettin is: Flour, $6.07; wheat, $3.93.

OBSTACLES TO TRADE.

The only obstacle in the way of the extension of trade in American flour is the high tariff.

I think that a lower grade of American flour introduced into the German markets would bring quicker sales. This must be accomplished by a more extensive agency.

TRADE OUTLOOK.

The prospects of doing a great business in American produce is not very bright in this district, which produces more than it consumes and which is continually exporting inland and to other countries.

F. W. KICKBUSCH,
Consul.

STETTIN, *January 19, 1894.*

STUTTGART.

QUALITY OF FLOUR CONSUMED.

The people here have a slight prejudice against American products of all kinds.

A fine quality of flour is principally used, although an inferior grade is largely utilized for black and rye bread.

AMERICAN FLOUR AND WHEAT.

No American flour has been imported into Würtemburg since the duty was raised to 7.50 marks per 100 kilograms.

No records are kept of the quantity of American wheat imported, as importations are not made directly from America, but through wholesale dealers in Hamburg, Bremen, and other seaports.

No records are kept of the amount of wheat flour received from other countries, but it comes mostly from Hungary.

In the beginning of 1893 Roumanian wheat ran a close competition with the American, and toward the end of the year the American wheat was driven from the field.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are very good, every bank readily buying or selling American money. In selling, the banks allow, on an average, 4.17 marks per $1; in buying, 4.20 marks per $1 is charged.

OBSTACLES TO TRADE.

To my knowledge, there are no obstacles in the way of the extension of trade in American flour, no discrimination being made against the United States in the way of duty. In fact, the United States, with other countries having a commercial treaty with Germany, pay 7.50 marks per 100 kilograms on flour, whereas those countries not having this treaty pay 10.50 marks per 100 kilograms.

TRADE OUTLOOK.

If the American flour is equal in quality to any other, and the price is as cheap or a little cheaper, I see no reason why an extensive business can not be done.

In conclusion, I beg to inclose herewith five samples* of flour, with prices, as follows:

	Marks.
100 kilograms, with sack, finest Kaiser flour	27.00
100 kilograms, with sack, flour No. 1	24.00
100 kilograms, with sack, bread flour No. 2	22.50
100 kilograms, with sack, bread flour No. 3	20.50
100 kilograms, with sack, bread flour No. 4	17.50

ALFRED C. JOHNSON,
Consul.

STUTTGART, *January 25, 1894.*

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* Filed in the Department.

ITALY.

MESSINA.

STANDARD OF LIVING.

Compared with the American standard of living, that in this district is very much lower. Thirty years ago it was, with the exception of a few of the interior villages of Switzerland, the least expensive place to live in all Europe; but since that time the standard has gradually been raised. Nevertheless, it is even now remarkably low. The wages for unskilled labor average only 35 cents and skilled labor 45 cents per day. On these paltry sums the classes interested manage somehow to exist. Sometimes these wages are all that the peasant farm laborer or city mechanic has to feed six or seven hungry mouths, although there are very few of them who at all times successfully keep the wolf from their doors.

QUALITY OF FLOUR CONSUMED.

Twenty years ago the country people ate largely bread made from barley and maize, which have now entirely disappeared from consumption, and instead they only purchase good wheat flour. The octroi, or excise, duties being much higher in the cities than in the rural districts, the quality consumed in the former is of a much inferior grade.

The people would only be too glad to get good American flour, but the importation is virtually prohibited in Italy by the very high tariff that went into effect a few years ago in order to protect home industries. The duties were then fixed as follows: Wheat, 5 lire* per 100 kilograms gross; wheat flour, 8.70 lire per 100 kilograms net; semola (hard wheat flour for making macaroni), 11 lire, gold.

IMPORTS OF FLOUR AND WHEAT.

Most of the flour used in the district of Messina comes from Venice; the millers of that city, for some unexplained reason, being able to undersell those of Calabria and Sicily.

The imports of wheat into this district during the year 1893 were 30,674,935 kilograms, principally from Black Sea ports, but during the years ending June 30, 1891, 1892, and 1893, there were no imports of wheat or wheat flour from America or of wheat flour from any country.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are good.

There is no direct line of communication between the United States and Messina, but the steamers of the Navigazione Generale Italiana and those of the North German Lloyds accept shipments from New York for Messina on through bills of lading. The steamers of the Phelps line go from Catania, Messina, and Palermo direct to Boston and New York, but on their eastward trips touch at numerous ports both in the Mediterranean and Black seas before reaching Sicily.

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* 1 lire = 19.3 cents.

TRADE OUTLOOK.

The greatest obstacles to the extension of trade in American flour in this district are the comparative duties on wheat flour and semola, as above stated, and the excise duty, which is 8.50 lire (paper) per 100 kilograms.

The prospects of doing any business at all in American flour here are very unfavorable and will remain so until the obstacles I have mentioned are either greatly reduced or absolutely removed.

CHAS. M. CAUGHY,
Consul.

MESSINA, *January 15, 1894.*

TURIN.

The standard of living in this, the Alpine, province of Italy is moderate, low in the rural and mountain regions, and but little better in the cities. In the former flour, as used by the average family in America, would be considered a luxury for which the peasant has neither a notion nor an appreciation, while in the cities, though the consumption of flour is large, the demand seems to be sufficiently supplied by the home article.

The flour most popular here is about equal to "B" (bakers') brand used in the United States, probably not quite as finely powdered; the wholesale price for mark "B" is 31.50 lire ($6.08) and mark "b" 28.50 lire ($5.50) per quintal (220 pounds).

According to the statements made by dealers in flour, by the railroad authorities, the inland tax bureaus, and according to the official statistics of the Chamber of Commerce of Turin, no importation of flour or wheat coming from the United States or any other foreign country is recorded. Still, a stray barrel or two of flour may have come to this district now and then from America.

Among the élite Hungarian flour is used for making fine pastry more as an *article de luxe* than a household necessity. The importation of Hungarian flour is insignificant.

I have been told by an authority on the subject that the mill men of this district favor for the very best article they bring to market a mixture of 75 per cent of the native wheat with 25 per cent of Russian and Roumanian wheat. The figures, however, as to the quantity of wheat brought to this district from the countries named I prefer not to give; they were based on too vague calculations and would only tend to mislead.

MONETARY AND SHIPPING FACILITIES.

Turin, being in close and constant communication with the capitals of the different European countries, offers easy facilities for money exchanges. Drafts on London or Paris against shipping documents at stated terms are most in vogue.

The most direct line for shipping anything from the United States to this inland district is by water way to Genoa. Railroad communication between Genoa and Turin is short and comparatively frequent.

Freight charges on wheat are 1.50 lire (29 cents) per 100 kilograms (1,000 kilograms=1 ton); on flour they are 2 lire (38½ cents) per 100 kilograms.

OBSTACLES.

The main obstacles are the high import duty which the Royal Government is levying on flour and the special tax levied by every community, no matter how small, on any article of food coming into the limits of its territory. Such local tax very often is unreasonable and outrageously high. In some little hamlets in this neighborhood the tax on flour is as high as 15 centesimi (1½ cents) per pound. So much as to the principal obstacles at this end of the line.

Even with the high Government duty and the local tax working against the importation of flour, an enterprising leading business house in Turin undertook to introduce American flour. Very kindly the head of the firm laid before me the extensive correspondence he had on this topic with several large milling concerns in Minnesota.

Samples sent from the United States proved to be satisfactory and the Italian firm figured out that by close calculation and shrewd management American flour could be sold profitably here.

The time given for payments here, as is the case over nearly all the Continent, is from three to six months. That did not suit the Minnesota parties; they demanded the privilege to draw on the Italian firm on delivery of goods at three-fourths of the value; of course, that was impossible for the Italian. Thus an experiment, promisingly begun, died in its embryonic state.

PROSPECTS.

Notwithstanding the drawbacks just mentioned, I am fully convinced that there is more than a fair chance to introduce American flour into this consular district.

The import duties levied by the Italian Government will remain, for it is utterly impossible to lessen them, on account of the deplorable state of its finances and on account of existing treaties of commerce. These factors always have to be taken into consideration.

A different matter is the commonalty tax, against which at present in Sicily the agitation has reached a state approaching open rebellion. That the extent to which communities are permitted to levy oppressive taxes on necessaries of life will hereafter be more under control of the National Government, there is in my mind but little doubt. They will be decreased, but they can not be altogether abolished.

With local taxes at a minimum, the main obstacle against extensive trade in American flour in this country is removed.

To a certain extent it is the fault of the American merchant if his articles do not find a ready market abroad. When a country desires to extend trade to another it should not stick to rules and customs established among tradespeople at home; on the contrary, it should carefully study the notions, requirements, and defects of the new market and cater to the tastes of the people it wants to deal with. Without adopting this principle, our merchants never will have success abroad; a too lofty standpoint taken by the party desiring to introduce wares into new lands is not likely to draw customers or to extend trade. The secret of success of the Germans lies in that. With their comparatively inferior goods they control pretty nearly every foreign market. Why? Because they have adapted their commerce altogether to the wants and habits of the nations they deal with, no matter if the latter are savage or civilized.

If American merchants could only be induced to follow a little the example of the Germans, the rivalry between the two nations in foreign trade would become lively. The final success is bound to be with the best articles, and they come from the United States.

W. E. MANTIUS,
Commercial Agent.

TURIN, *January 10, 1894.*

PORTUGAL.

THE AZORES.

By the laws of Portugal no wheat or wheat flour is allowed to be imported into the Azores. A small amount of American flour is used here and is preferred to that made from the wheat grown in these islands or in Portugal, but this is (and must be) imported from Lisbon.

The facilities for monetary exchange are quite limited, the exports, except to Lisbon, being exceedingly light. The exports to the United States for the past three years amounted to only $3,265.67.

There are two lines of steamers—four steamers—running between Portugal and New York via the Azores. There is also a bark owned in Boston running between that port and the Azores.

LEWIS DEXTER,
Consul.

FAYAL, *January 18, 1894.*

RUSSIA.*

STANDARD OF LIVING.

The standard of living in this district (St. Petersburg) compares favorably with that of other European countries, so far as the upper classes are concerned. The lower classes, however, especially the peasants, are less exacting in their tastes and needs than the corresponding classes elsewhere. There is no doubt whatever that the Russian people as a whole are ready to eat American flour, provided it costs them no more than the corresponding grades manufactured at home.

QUALITY OF FLOUR CONSUMED.

The Russian people seem to prefer black rye bread to wheat bread, not because the latter is more expensive, but because it lacks that peculiar taste and odor which they like. There is a Russian proverb that well expresses this tendency of the Russian people for this kind of food: "Of black rye bread one never tires and can never eat too much." It may be truly said that the lower classes—the soldiers—will select rye bread in preference to wheaten bread every time. I have personally asked this question on many occasions, and, if the person interrogated was Russian born, he invariably answered, "I prefer the rye." If, however, he was foreign born, his reply would be in favor of wheat. This view of the case, it should be understood, pertains more forcibly to the middle and lower classes; the better people eat both rye and wheat.

RUSSIAN WHEAT AND FLOUR.

Of the wheat flour, the qualities most used are the heavy flour made from *Triticum durum* and the light, *Triticum vulgare*. These two groups, however, contain several varieties whose denominations are not easily made out. To the hard wheat belongs first of all the *arnaoutka*, which is grown in the southern districts, and in some places is called *garnovka*; the next grade of hard wheat is a hybrid of *arnaoutka* grown extensively in the Volga regions, where it is called *bielotourka* when it comes from the sloping banks of the river and *koubanka* when raised on the surrounding hills. Of the soft wheats, the so-called *girka* leads, grown in the south; then comes the *russak*, or Russian wheat, grown in the vicinity of the Volga, and then the *saxonka*, or Saxon wheat; in the more western governments the *sendomirka* is a prevalent species. On the markets these grades are classified as high, medium, and low, which are further subdivided by the addition of a suffix word to indicate the place of origin. The soft wheats are generally exported, while the local mills grind for home use a mixture of the hard and soft wheats.

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* Consul Thomas E. Heenan, of Odessa, reports that no wheat or flour is imported into his district. Wheat flour is not used by the peasantry, who constitute nine-tenths of the population. No direct shipments are made to the United States, all goods being transshipped at continental or British ports. Occasionally direct shipments are made from the United States of cotton and agricultural machinery. The acting consul at Moscow also reports that no wheat flour is imported into his district.

Below is appended a table, which will give a general idea of the manner in which the mixed hard and soft wheats of different districts are worked up into different grades of flour and bran.

Percentage of flour of different qualities and bran produced.

Sorts.	Mills near—				
	Rybinsk.	Yaroslav.	Kostroma.	Nizhni-Novgorod.	Kazan.
Flour:	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*
First quality	27.5	23.33	23	39.17	20.83
Second quality	12.5	16.66	13.5	29.17	30
Third quality	25	14.17	19.75	6.67	15
Fourth quality	9.2	12.5	13	4.17	9.17
Fifth quality	3.3	6.67	5.25	2.5	4.17
Sixth quality	1.7	5.83	4.3	......	......
Seventh quality	......	4.07	2.1	......	......
Bran	18.8	15	16.1	16.66	16.66
Waste	2	1.77	3	1.66	4.17
Total	100	100	100	100	100

Sorts.	Mills near—				
	Samara.	Orenburg.	Saratov.	Livno.	Yelets.
Flour:	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*
First quality	19.17	16.67	16.66	15.66	15.5
Second quality	40.83	41.67	10	39.58	39.5
Third quality	11.66	15	18.75	8.75	9
Fourth quality	4.58	6.67	14.58	4.58	3.75
Fifth quality	4.58	3.33	10.41	......	......
Sixth quality	......	......	8.33	......	......
Seventh quality	......	......	2.91	......	......
Bran	16.66	16.66	16.46	27.68	27.5
Waste	2.52		1.9	3.75	4.75
Total	100	100	100	100	100

IMPORTS OF FLOUR AND WHEAT.

As indicated at the outset of this report, the import of flour into all Russia from all sources is altogether insignificant, due, first, to the fact that Russia is a great exporter of grain, and, second, to some extent at least, to the high customs tariff. In 1890 the total import of flour amounted to 3,170 tons and in 1891 to 2,120 tons, these figures including a considerable quantity of groats and malt. The import of wheat in the kernel may be set down as practically *nil*, and is confined to seed wheat. It should be added here that, though Russia exports enormous quantities of the grain, it exports very little flour, as shown below:

Flour of all kinds, except potato:	Tons.
1889	49,795
1890	39,300
1891	41,283

There was practically no import of American flour into Russia in 1892, except that brought by the five relief ships, and which was distributed among the famine sufferers and therefore did not enter into the custom-house statistics.

The figures are not yet made up to indicate the import of wheat flour into Russia for the year ending June 30, 1893. I have learned, however, on inquiry that the sum total is practically so small as to be inappreciable.

No American wheat in the kernel has been imported in the years mentioned, except small quantities for seed purposes and for experimental stations.

The import of wheat flour into Russia is so unimportant that no statistics are given to indicate from what country it comes.

DUTIES.

The import duty on flour from all countries is 20 copecks per pood brutto, or practically the equivalent of 10 cents per 36 pounds. Wheat may be imported into Russia free of duty.

EXCHANGE FACILITIES.

The facilities for monetary exchange can not be said to be good. All business is transacted in Russia on the basis of the paper ruble, which is always a depreciated currency and has fluctuated during the past four years between 85 and 115 rubles to the £10. These fluctuations are often very sudden, and there is no way of estimating what the rate of exchange will be for thirty or even ten days ahead. Because of this state of affairs, in large and close negotiations the future exchange is bought at the banks to cover the time of the deal. This, however, is sometimes very expensive, especially if the ruble is panicky, as the bankers must take a considerable margin in order to cover their risk. It should be definitely understood that there is practically no such thing as a metallic currency in Russia. There is nominally, however, a silver ruble, which, by the way, is never seen except in the show windows of the money-changers, and which at the date of this report is more depreciated than the paper ruble—that is to say, one can present 1,000 paper rubles, a seriously depreciated currency, to the Government Bank and receive in exchange more than 1,000 silver rubles. The monetary standard in Russia is gold, although no gold is seen in business. Its operations are confined exclusively to the payment of customs duties. The depreciation of the paper currency from the gold standard always corresponds closely to the depreciation of the paper ruble from the pound sterling. It may be said that the value of the business currency of Russia is always estimated according to its exchange on London. This undesirable situation of the monetary exchange applies only to foreign markets. In the Empire the paper ruble is always the paper ruble, the prices of goods never varying with its depreciation on the foreign bourse. In other words, the paper ruble buys as much on the home markets with exchange at 115 as at 85 to the £10. It may be said that in the grain-export trade of Russia the fluctuations of the paper ruble often result in very serious consequences to the Russian farmers. For example, in 1890, with good prices prevailing on the London market for wheat, the exchange value of the paper ruble was so high that it became impossible to export the grain without a serious loss, the farmers receiving in consequence very few rubles for their goods in comparison with other years when the paper ruble was more greatly depreciated.

SHIPPING FACILITIES.

The facilities for shipping from the United States to this port (St. Petersburg) are good. It is unfortunate, however, in this respect, that there is no direct freight line from the United States to Russia, goods having generally to suffer transshipment at Hull. There is no local reason, however, why freight vessels from the United States should not come direct, as the port facilities here are excellent. For example, when the American relief ship *Leo*, drawing about 20 feet of water, came to St. Petersburg in the summer of 1892, she laid down her cargo at New Port, where the railway cars were waiting to transport it to different points in the interior.

RUSSIAN GRAIN EXPORTS.

I have thought that it would be interesting in this connection to supplement the foregoing with a brief report upon the grain-export trade of this country, as it will throw considerable light upon the several interrogatories propounded by the Department and answered above.

As indicated in the foregoing report, the export of grain from Russia, great as it is, is seriously affected from year to year by the fluctuations of the paper ruble on the foreign bourses, as well as by unequal demands on the foreign markets consequent upon the harvests of the importing countries and upon the crops of those countries which rival Russia in the international grain trade. To what a degree such circumstances may affect the Russian export trade of grain may be seen by comparing the exports in 1887 and in 1888, when the crops were abundant, with those of 1890 and 1891, when they were unsatisfactory. In 1891, notwithstanding the fact that the export of cereals was prohibited by imperial ukase a part of the year, the average wheat export was but little below the normal.

It is interesting to note that, notwithstanding the yearly fluctuations above mentioned, there is a steady and rapid growth in the grain-export trade of the Empire. This fact is seen in the following table, in which the export of grain is shown in five-year periods from 1866 to 1891.

Export of grain from Russia.

Years.	Yearly average.	Years.	Yearly average.
	*Poods.**		*Poods.**
1866–'70	127,800,000	1877–'81	275,900,000
1867–'71	147,200,000	1878–'82	282,400,000
1868–'72	149,200,000	1879–'83	275,300,000
1869–'73	163,900,000	1880–'84	267,500,000
1870–'74	191,400,000	1881–'85	294,000,000
1871–'75	193,200,000	1882–'86	305,800,000
1872–'76	196,200,000	1883–'87	322,600,000
1873–'77	218,600,000	1884–'88	363,300,000
1874–'78	256,200,000	1885–'89	394,800,000
1875–'79	279,300,000	1886–'90	413,300,000
1876–'80	279,800,000	1887–'91	437,800,000

* 1 pood=36 pounds.

The following table has been prepared by the Ministry of Agriculture to indicate the yearly average export of wheat, rye, oats, and barley for five-year periods from 1866 to 1890, showing at the same time their percentage of increase:

Yearly average export of the principal cereals from Russia.

Years.	Wheat.		Rye.		Oats.		Barley.	
	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.	Quantity.	Per cent.
	Poods.		*Poods.*		*Poods.*		*Poods.*	
1866–'70	76,700,000	100	19,800,000	100	14,800,000	100	7,200,000	100
1871–'75	92,000,000	120	53,000,000	268	23,800,000	161	11,700,000	162
1876–'80	110,400,000	144	82,900,000	419	42,600,000	288	20,500,000	278
1881–'85	123,800,000	162	60,500,000	306	51,100,000	345	32,000,000	444
1886–'90	160,700,000	210	82,000,000	414	61,100,000	413	61,200,000	850

From the foregoing figures it will be seen that, while wheat shows the lowest percentage of increase as compared with oats, rye, and barley, the absolute increase in the export of wheat shows the greatest proportions. Thus the export of wheat increased 84,000,000 poods, rye 62,000,000 poods, oats 46,000,000 poods, and barley 54,000,000 poods from 1866 to 1890.

It will be of considerable interest to the milling industry of the United States to tabulate the export of wheat flour from Russia as follows (no account being taken of the export to Finland, amounting to about 1,000,000 poods per annum):

Year.	Quantity.	Year.	Quantity.
	Poods.		*Poods.*
1882	1,981,000	1887	2,350,000
1883	1,339,000	1888	2,695,000
1884	2,013,000	1889	2,162,000
1885	3,492,000	1890	1,617,000
1886	2,487,000	1891	1,809,000

It will thus be seen that the export of wheat flour is inconsiderable when compared with that of the grain. The United States export more than half of their wheat in the form of flour, while Russia exports barely one per cent of her wheat in the ground condition.

The following table has been prepared to show the export from Russia of wheat, rye, barley, oats, buckwheat, and maize from 1881 to 1892, inclusive:

Export of breadstuffs from Russia.

Year.	Wheat.	Rye.	Barley.	Oats.	Buckwheat.	Maize.
	Poods.	*Poods.*	*Poods.*	*Poods.*	*Poods.*	*Poods.*
1881	82,224,000	38,325,000	20,683,000	39,053,000	721,000	13,588,000
1882	128,230,000	50,848,000	27,192,000	53,361,000	628,000	16,468,000
1883	140,665,000	69,144,000	39,862,000	60,182,000	1,899,000	11,086,000
1884	113,710,000	68,960,000	33,929,000	60,882,000	1,837,000	17,136,000
1885	154,058,000	75,060,000	38,437,000	38,938,000	2,460,000	8,670,000
1886	86,656,000	65,023,000	41,258,000	34,651,000	2,682,000	19,695,000
1887	130,619,000	77,553,000	58,541,000	61,061,000	2,609,000	29,761,000
1888	214,141,000	106,159,000	79,888,000	87,890,000	2,049,000	22,109,000
1889	190,388,000	84,303,000	65,766,000	70,144,000	1,516,000	26,898,000
1890	181,909,000	76,907,000	60,699,000	51,881,000	1,366,000	20,611,000
1891	176,097,000	68,005,000	45,974,000	45,962,000	1,385,000	28,209,000
1892	81,446,000	12,040,000	43,842,000	25,055,000	693,000	21,580,000

To give a general idea of the money value of the grain-export trade of Russia of all kinds, it may be said that in 1888, which was one of the best years, the figures amounted to 434,000,000 rubles, that is to say, in round numbers $217,000,000, and equaling in value about 55 per cent of the total export of the Empire.

The following table has been prepared to indicate, in a general way, the amounts of Russian grain exported to the principal European countries:

Shipment of grain from Russia.

Exported to—	Wheat.		Rye.	
	1889.	1890.	1889.	1890.
	Poods.	*Poods.*	*Poods.*	*Poods.*
Great Britain	66,100,000	60,100,000	....	....
France	23,100,000	18,100,000	500,000	....
Germany	18,300,000	22,600,000	55,600,000	45,500,000
Holland	15,900,000	18,000,000	23,400,000	21,500,000
Belgium	6,600,000	5,800,000	1,700,000	2,100,000
Italy	38,600,000	28,200,000	....	....

Shipment of grain from Russia—Continued.

Exported to—	Oats.		Barley.	
	1889.	1890.	1889.	1890.
	Poods.	*Poods.*	*Poods.*	*Poods.*
Great Britain	43,300,000	27,700,000	24,400,000	25,600,000
France	5,800,000	2,700,000	3,600,000	1,600,000
Germany	14,500,000	10,600,000	18,300,000	22,300,000
Holland	7,000,000	8,200,000	4,400,000	8,700,000
Belgium	7,600,000	6,300,000	5,600,000	3,400,000
Italy	....	....	5,600,000	4,400,000

It will be seen from the foregoing table that Great Britain is by all odds the greatest importer of Russian grain and that Russia is a formidable rival of the United States in this particular on the English market, especially in wheat.

The total Russian export of the principal cereals in 1890 may be indicated as follows: Wheat, 181,900,000 poods (109,140,000 bushels); rye, 76,900,000 poods (48,792,661 bushels); oats, 51,900,000 poods (51,900,000 bushels); and barley, 60,700,000 poods (47,504,348 bushels).

J. M. CRAWFORD,
Consul-General.

ST. PETERSBURG, *January 7, 1894.*

FINLAND.

STANDARD OF LIVING.

The standard of living in my district is in general simple and economical. The people do not seem to care much for American flour. The quality of wheat flour most used is medium; rye flour is the principal flour consumed.

IMPORTS OF FLOUR AND WHEAT.

The quantity of American wheat flour that has been imported into my district has been very small, and of this no statistics can be obtained. Through private sources I have found that about 1,000 English tons were imported into this country during last year. This quantity was shipped partly by way of England and partly by way of Germany.

Of wheat flour from other countries, 23,000,000 kilograms were imported during 1892 and 34,000,000 kilograms during 1893.

Very little American wheat is imported.

Of wheat from other countries, 794,000 kilograms were imported during 1892 and 439,000 kilograms during 1893—from Russia chiefly and in smaller quantities from Germany and Denmark.

There is no import duty on flour or wheat imported from any country. All grain is duty free.

EXCHANGE AND SHIPPING FACILITIES.

The following banks transact business with the principal towns in Europe: Finland's Bank (Government Bank) at Helsingförs, established in 1811; Förennigs Banken i Finland, Helsingförs; Nordiska Aktic Banken för Handel och Industri, Helsingförs, head office at Wiborg; National Banken, Helsingförs. All these banks are respectable and safe and have branches in nearly every town in Finland; they have also correspondents in several of the principal towns in the United States.

There is a line of steamers from Boston and New York direct to Hull, called the Wilson line, and regular communication from Hull to Helsingförs, Hangö, and Åbo by Finland steamers leaving Hull every Saturday.

TRADE OUTLOOK.

The only obstacle to the extension of trade in American flour seems to be that the people do not care much for it. A more extensive business might be done if American agents were to come over and push the trade.

HERMAN DONNER,
Acting Consul.

HELSINGFÖRS, *January 24, 1894.*

SPAIN.

BARCELONA.

IMPORTS OF WHEAT AND FLOUR.

The total amount of wheat imported into Barcelona during the year 1890 was valued at $3,400,000. It came from France, England, Russia, Roumania, Asia, Africa, and the Argentine Republic. The total amount of wheat flour imported during the same year was valued at $11,172; it was received from France and Austria.

In 1892 the wheat imported into Barcelona was valued at $3,390,000, and the wheat flour at $3,368; it came from France, Italy, Austria, Russia, Turkey, Roumania, and the Argentine Republic.

In 1893 there were $1,857,574 worth of wheat and $118 worth of wheat flour imported into Barcelona from France, England, Russia, Roumania, the Argentine Republic, and the United States. The importation from the United States was wheat, which amounted to $360,000.

SHIPPING FACILITIES.

There is no direct line of steamships or sailing vessels between Barcelona and the United States, and the importations, therefore, came in "tramps" or by way of Marseilles or other foreign ports.

DUTIES.

As the United States have not followed the example of the other great powers in making a treaty or a *modus vivendi* with Spain, American imports into Spain are subject to the payment of the highest rate of duties.

TRADE OUTLOOK.

The only way to increase very largely our exports to Spain is to make a treaty with her, and I think that we would find her a valuable buyer if we would agree to reduce our duties on her wines and fruits.

HERBERT W. BOWEN,
Consul.

BARCELONA, *January 8, 1894.*

CARTHAGENA.

STANDARD OF LIVING.

Bread and vegetables are the principal articles of food of the poorer classes, and the Spaniards, on the whole, are great bread eaters. No doubt people here would be ready to use American flour, provided they could get it cheap enough.

IMPORTS OF WHEAT AND FLOUR.

The quantity of American wheat imported into this district in small parcels via Liverpool and London during the years ending June 30, 1891, 1892, and 1893 were 980, 730, and 1,069 tons, respectively. There was no American wheat flour imported during the same periods.

There were 9,600 tons in 1891, 15,608 tons in 1892, and 14,160 tons in 1893 of wheat flour imported into this district from other places—say Barcelona, Tarragona, and Marseilles—and 2,600 tons, 3,350 tons, and 4,280 tons of hard Taganrog wheat, respectively, during the same periods.

EXCHANGE AND SHIPPING FACILITIES.

There are no direct banking facilities between this district and the United States. American exporters would have to draw on the buyers payable here or have their drafts accepted here and payable in London or Paris, although the former plan would be generally insisted upon.

No facilities for shipping from the United States to our ports exist. The small quantities of American goods which come to this district and to the Spanish Mediterranean ports in general are received via London or Liverpool.

The high freights and the expenses of transshipping, etc., make it impossible for American goods to compete with those of European countries.

OBSTACLES TO TRADE.

The present tariff on flour of $2.66 per 224 pounds almost, if not wholly, shuts out foreign flour from the Spanish markets. The tariff on wheat is only $1.60 per 224 pounds. This enormous difference was established in 1891, upon the expiration of the commercial treaty with France, chiefly to shut the Spanish markets to flour imported from France, and also to favor local flour producers.

TRADE OUTLOOK.

To do a more extensive business in American flour, etc., in this country requires: (1) The conclusion of a treaty of commerce between Spain and the United States; (2) the establishment of one or more direct lines of steamers calling at all the principal Spanish ports; (3) the constant exhibition of American products and goods by samples, through the American consulates, at the chambers of commerce where they are located; (4) good commercial travelers and agents.

Good commercial travelers are very important in the development of new business, and I would therefore recommend American producers to send such to this country, where a fair amount of business can be done.

This district is a very important market as regards the consumption of wheat flour. It is not, however, a wheat market, although some small parcels of American wheat and one or two whole cargoes direct from Russia are received here yearly for the use of the mills of this province. Still, the foreign wheat consumed here is of no real importance at the present time.

A large quantity of flour made from wheat received at the ports of Marseilles, Barcelona, and Tarragona from foreign countries, principally from Russia, is, however, sold in this district.

Both the flour made from hard and soft American wheat would find a good market here, provided prices would allow it to compete with other classes. Hard wheat, I understand, is most suitable to this market.

ALBERTO MOLINA,
Vice-Consul.

CARTHAGENA, *January 21, 1894.*

GRAO.

STANDARD OF LIVING.

The people of this district are ready to eat American flour if it can be had cheaper than the French or Hungarian flour or can compete with that produced from domestic, Russian, and the East Indian wheat.

IMPORTS OF FLOUR AND WHEAT.

The imported flour most used is that made from hard and soft wheat, and of these the lower or darker shaded grades are generally preferred to the whiter and finer qualities, which sell only in small quantities.

No American wheat flour was imported during 1891 and 1892. A small quantity (3,000 bags) was imported here in 1893 on trial; but, owing to the distance, no further orders have followed as yet. The convenient neighborhood of Marseilles facilitates operations in small quantities.

No American wheat was imported during the years under consideration.

Flour imported from other countries during the calendar years 1891, 1892, and 1893 amounted to 1,520,081, 1,522,680, and 199,087 kilograms, respectively. Wheat imported from other countries during the same years amounted to 15,104,377, 14,562,880, and 33,584,493 kilograms, respectively.

EXCHANGE AND SHIPPING FACILITIES.

Exchange should, under every circumstance, be made through approved bankers' credit on Paris or London.

There is no direct steamer communication between the United States and this port, and transshipments via Great Britain or France increase the prices.

OBSTACLES TO TRADE.

The principal obstacle is a want of direct steamship communication which would convey small quantities for the introduction of American products. Until these are better known here, American exporters might keep a certain stock of their goods in the Marseilles or Algiers docks to supply the Spanish demands.

THEODOR MERTENS,
Consular Agent.

GRAO, *January 23, 1894.*

MALAGA.

STANDARD OF LIVING.

The standard of living among the upper and middle classes is as high in this district as in any part of the world, while among the poorer classes it is probably lower than in many other countries.

In years when the Spanish wheat crop is small there is a much greater demand for American wheat than when the native crop is an average one, as the home-grown wheat is preferred to any other. Flour made from home-grown wheat is most generally used.

IMPORTS OF WHEAT AND WHEAT FLOUR.

Countries.	Wheat.		Flour in 1893.
	1891.	1893.	
	Tons.	*Tons.*	*Tons.*
United States	....	1,300	....
England	....	15,445	141
France	....	1,030	173
Morocco	14	2,273	....
Total	14	20,048	314

NOTE.—There were no imports of wheat in 1892 and none of flour in 1891 and 1892.

The quantities of wheat and flour given as imported from England comprise about 80 to 90 per cent of American-grown wheat, the remainder being of Persian, Canadian, and Chilean growth.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are the same as in other European countries, payment for American imports being made by bills on London.

The facilities for shipment from the United States are very much restricted, there being no direct lines of steamers from the United States to this port. Most American goods arrive here via England.

OBSTACLES TO TRADE.

The obstacles to the extension of trade in American flour is the duty levied on all foreign-grown wheat and the present fluctuations in exchange.

TRADE OUTLOOK.

From personal investigation, I have come to the conclusion that American wheat flour is not in much demand in this market, though some is sold. Wheat flour from hard wheat is preferred. The consumption of flour is very great, especially among the classes who can not afford to eat beef or pork, and when it happens that native flour becomes scarce there is always a demand for foreign-grown wheat.

Formerly wheat from the United States was not much liked here, people being accustomed to hard wheat, but now they begin to find that the American wheat makes the bread light and fine; the article sells well.

The mills in this vicinity are not altogether adapted to grind American soft wheat, for which reason the American product is always mixed with Spanish hard wheat.

THOMAS R. GEARY,
Acting Consul.

MALAGA, *January 24, 1894.*

SWITZERLAND.

BERNE.

The standard of living in this district, as well as in the whole of Switzerland, is of the highest. American flour is not much used in the Berne district, on account of the peculiar forms of bread baked here, for which, I am informed, the American flour is not as well suited as that from other countries.

In the eastern and French cantons of Switzerland considerable American flour is consumed. White flour is most used.

As the statistics do not show the import of flour and wheat for districts, I give herewith a general table for all Switzerland for the years ending June 30, 1891, 1892, and 1893, in quintals of 220 pounds:

Kinds.	1891.	1892.	1893.
	Quintals.	*Quintals.*	*Quintals.*
Wheat flour:			
American	885	1,103	3,143
All other	232,479	154,866	252,361
Wheat:			
American	1,896	244,990	391,674
All other	3,413,360	2,881,179	3,067,497

The considerable difference between the imports, as above shown, in 1891 and 1892, as compared with 1893, is explained by the circumstance that only since February 1, 1892, have the countries of production of the imported goods been ascertained; prior to that date the country of the late exchange was taken as the country of origin.

Monetary exchange is at sixty days, with accepted draft, or cash with one per cent discount.

The most usual method of transportation from the United States is New York to Havre or Rotterdam and thence to Basle for any part of Switzerland.

To my knowledge or information, there exist no obstacles in the way of the extension of trade in American flour.

For doing a more extensive business in American flour in Switzerland, skillful agents should be sent here, whose duties would be to study the customs and conditions of the Swiss wheat and flour market and thereby gain a thorough knowledge of the wants of the customers.

JOHN E. HINNEN,
Vice-Consul.

BERNE, *January 10, 1894.*

GENEVA.

STANDARD OF LIVING.

The consular district of Geneva is composed principally of the two large cantons of Geneva and Vaud, with a population at present of about 400,000, against 344,621 in 1888. These are all French-speaking people, and the two cantons comprise the principal and most important part of what is known as French Switzerland. The standard of living in the two cantons is excellent—as good as, if not better than, anywhere else on the continent of Europe. The bread consumed by these people is made almost exclusively of wheat flour. Even the peasants are able to eat a tolerably fair quality of white bread, the wretched black bread of certain other European countries being almost entirely unknown here.

AMERICAN FLOUR.

Bakers claim that while from 100 kilograms of Russian, Roumanian, Hungarian, or other standard European flours they can produce 140 kilograms of bread, they can make only 130 kilograms from American flour. This, they say, is due to the fact that there is not as much gluten in American as in the European article, and that it is too starchy; that, therefore, they can not afford to use it unless it should be considerably less in price than the first quality of European flour, which it has never been in this market.

But there is another reason why the market for American flour can not be materially enlarged in Switzerland, or, more particularly, in this consular district. For the protection of the native or home millers a duty of 2 francs per 100 kilograms is imposed on flour imported from all other countries. Without going into the details of weights and measures, it may be stated that 100 kilograms are equal to a little more than a barrel and a quarter of flour, considering 196 pounds to the barrel, and that, according to the present rate of exchange, 2 francs are the equivalent of 39 American cents. Taking 196 pounds to the barrel, it may be easily calculated that a barrel of flour would pay a duty of 34.71 American cents. Thus, when it is considered that the import duty on wheat is only 6 cents per 100 kilograms, it appears that the Swiss miller is pretty well protected; so well, in fact, as to make the importation of flour almost prohibitive, while, on the other hand, nearly all the grain the Swiss millers use is brought from other countries. The import duty on all wheat is 30 centimes per 100 kilograms and 2 francs (or 39 cents) on all flour, except on French flour. Switzerland discriminates slightly against her republican neighbor and imposes a duty of 2.50 francs on French flour. For the reasons above set forth, there seems to be little prospect, at least for the present, of making a market for American flour in this consular district.

Nor does it appear that the market for American wheat in this district is susceptible of great enlargement. Millers say they are willing to buy American wheat when it is cheaper than Russian and Roumanian, but not often otherwise, and even then only in comparatively small quantities. They frequently use about 25 per cent of American wheat to mix in with the Russian or Roumanian grain, for the reason that the American admixture lends a white color to the flour. But they say they are not prepared at present to use American wheat exclusively, even under the most favorable conditions of price. This, they say, is for the reason that all the milling machinery of Switzerland is made for grinding the European grain, which is very much harder than the American article, and consequently the whole system would have to be changed before they could use American wheat excusively.

The favorite wheats of Swiss millers are Russian and Roumanian, although they use the product of Bulgaria and Servia in large quantities. Hungarian wheat is the highest in this market and is not being largely used at present. American wheat is quoted here generally at about the same price as Russian, which at present is worth, freight and duty paid, for first quality, 16½ to 17½ francs ($3.18 to $3.38) per 100 kilograms (220 pounds). It may be remarked, in this connection, that the present prices are lower than they have been before for many years.

Russian flour to-day is quoted here at 28 francs ($5.41) per 100 kilograms (220 pounds). American is quoted at 25 francs ($4.83), but I doubt whether a dozen barrels of genuine American flour could be found in the whole city of Geneva.

Switzerland consumes annually about 400,000,000 kilograms (14,700,000 bushels) of wheat. Of this all except about 5,000,000 kilograms (183,900 bushels) is imported. These figures are the estimates of intelligent Genevese millers and dealers; but they are only estimates, and I can not vouch for their accuracy.

There are in this consular district about twenty-five flour mills, some of which have a capacity of 30,000 kilograms (338 barrels) of flour per day. The two largest are at Geneva and Vevey.

QUALITY OF FLOUR USED.

The first quality of flour is most used in this district. A leading miller estimates it as follows: Sixty per cent first, 20 per cent second, and 20 per cent third quality.

The American wheat used here is what is known as No. 2.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange here are as good as in any other of the large European cities.

Nearly all flour and wheat shipped from the United States to southern France or Switzerland comes by ship directly to Marseilles and is thence transported overland to interior points. The facilities for shipping to this post may therefore be regarded as simple, direct, and excellent.

BENJ. H. RIDGELY,
Consul.

GENEVA, *January 30, 1894.*

HORGEN.

INTRODUCTION.

No importing or wholesale houses, nor any large mills, being located in this consular district, and no report on the movements of trade in the same being available, I can furnish only such information and statistics as refer to the whole of Switzerland, and I am sorry to say that even in this regard the reports coming from different sources do not always agree with each other.

STANDARD OF LIVING.

The standard of living in this district, as in the larger part of Switzerland, is high, much higher than in some of the other European countries. The bread consumed here is almost exclusively made of wheat flour ranging from good to best qualities, rye and other kinds of grain being but rarely used for bread-making.

A good deal of the flour is milled from American wheat, but, as almost all the bread consumed is furnished by the bakeries, the people generally do not know of what flour their bread is made. I learn, however, that but very little, if any, purely American flour is used in baking.

IMPORTS OF AMERICAN FLOUR.

American flour is imported to a very limited extent and as a general thing, I understand, the American wheat is mixed with native wheat or wheat imported from Russia, Hungary, or other Danubian states, partly on account of the prevailing opinion that the product of the American grain, though highly esteemed for its fine, white, and glossy appearance, is inferior in nutritive qualities to the flour made of the more glutinous European wheats, especially those raised in Hungary, but perhaps principally because the trade in European wheats, under ordinary circumstances, is more profitable for the dealer. That the millers are a unit against the importation of American flour, and even against the use of flour made exclusively of American wheat, is a matter of course. The fact that the prices paid for Russian and American wheat in the principal Swiss markets are about the same at the present time, while only Hungarian wheat is quoted considerably higher, seems to demonstrate clearly that the dealers themselves and the millers do not believe in the superiority of Russian over American wheat. I find in the latest market reports the prices of Russian and American wheat quoted alike at 18 to 19½ francs ($3.47 to $3.76) per metric centner of 100 kilograms (220 pounds), or about 95 cents to $1.03 per bushel of 60 pounds, while best Hungarian wheat is quoted at 20 to 21.50 francs ($3.86 to $4.15) per metric centner, or about $1.05 to $1.13½ per bushel. The preference for Hungarian over American and Russian wheat seems well established, but Hungary is not the principal source of the wheat consumed here, the largest amount being supplied by Russia. As far as American wheats are concerned, I learn that the millers prefer the northern spring wheats to the red winter wheats of the Middle States.

The importation of wheat flour into Switzerland is, as already mentioned, very limited. According to the statistics at hand, in 1891, 1892, and 1893 there were imported 885, 1,654, and 4,239 metric centners, respectively, of American flour. It may be presumed that a good part of the flour imported from France and Germany is at least partly the product of American wheat.

The total import of flour (without distinction of the grain from which it was produced, but consisting chiefly of wheat flour) into Switzerland for the years ending June 30, 1891, 1892, and 1893, is reported as follows:

	Metric centners.
1891	233,364
1892	203,676
1893	255,475

France, Russia, Austria, Germany, and Italy were the principal sources of supply, as will be seen from the following statement of the import of flour of all kinds into Switzerland during the year ending June 30, 1893:

Countries.	Quantity.	Countries.	Quantity.
	Met. cent.		*Met. cent.*
France	82,132	United States	4,239
Russia	56,509	Other countries	1,422
Austria	42,385	Total	255,475
Germany	35,910		
Italy	32,878		

It may reasonably be presumed that the import from Italy consisted mainly of corn meal, which in the statistical report is not separately named.

The Statistical Year Book of Switzerland for 1893 gives the following prices of flour in the market of Berne for the year 1892, which, on an average, are higher than the prices realized last year and higher than at the present time:

Prices of wheat flour per metric centner at Berne during the year 1892.

Year.	Superfine.	No. 1.	No. 2.	No. 3.
January	$8.49	$8.11	$7.72	$7.33
February	8.11	7.91	7.53	6.95
March	8.01	7.62	7.24	6.27
April	8.01	7.62	7.24	6.27
May	8.11	7.53	7.14	6.18
June	7.91	7.33	6.95	6.18
July	7.91	7.33	6.95	6.18
August	7.91	7.33	6.95	6.18
September	7.72	7.14	6.75	5.79
October	7.33	6.95	6.08	5.11
November	7.33	6.85	6.08	5.11
December	7.14	6.66	6.08	4.92
Average	7.83	7.36½	6.89	6.04

The price of American wheat flour I have never seen quoted in the market reports of Switzerland, which shows that, if it comes into market unmixed at all, it is not sold under its proper designation. The flour generally sold and used here for bread-making is at present quoted at 32 francs ($6.17) per metric centner (220 pounds), or 2.8 cents per pound.

In addition to the wheat flour, there were imported in 1892 from the United States 9,453 metric centners and in the first six months of 1893 about 2,800 metric centners of hulled and crushed leguminous grain, grit, oatmeal, corn meal, farina, etc., at an average value of about 33.50 francs ($6.47) per metric centner.

IMPORTS OF AMERICAN WHEAT.

The whole production of wheat in this country amounts, on an average, to about 1,000,000 metric centners, or 3,666,000 bushels, while over 3,000,000 metric centners, or 11,000,000 bushels, are imported from other countries, principally Russia, Austria-Hungary, other Danubian countries, and the United States.

The bulk of the wheat imported from the United States comes through Germany by the way of Mannheim, the head of navigation of the Rhine, and the principal grain market in Germany. Occasionally there is a contract made for a cargo of grain through the London Grain Trade Association,but as a general thing the importation of cereals from the United States is effected through the medium of commission houses at Mannheim.

Up to 1892 all the grain that found its way from the United States to Switzerland through Germany was declared and figured in the statistical reports as the import of Germany, and it is only since the 1st of January, 1892, that, according to a decree of the Swiss authorities, in declaration of imports the country of production must be stated. Consequently the statistics previous to 1892 leave us in the dark as to the actual importation of American grain into Switzerland, but, subtracting the average importations from Germany since 1892 from the importations reported previous to that time, we get a fair estimate of the American wheat imported into this country during the years 1891 and 1892, while for the year 1893 we have the actual import, as follows:

Year ending June 30—	Quantity.	
	Met. cent.	*Bushels.*
1891 (estimated)	369,400	1,354,466
1892 (estimated)	550,200	2,017,400
1893 (actual)	391,873	1,436,867

During the same periods there were imported into Switzerland from other countries the following:

From—	1890–'91.		1891–'92.		1892–'93.	
	Met. cent.	*Bushels.*	*Met. cent.*	*Bushels.*	*Met. cent.*	*Bushels.*
Russia	1,298,727	4,761,999	1,667,977	6,115,916	2,263,323	8,298,851
Austria-Hungary	1,342,394	4,922,111	444,073	1,628,268	540,433	1,981,587
Lower Danubian states	243,523	892,917	250,050	916,850	220,813	809,647

The importations from France, Germany, Turkey, and other countries in the same period amounted in the aggregate to not more than about 60,000 metric centners, or 220,000 bushels, per annum.

The statistical compilations in Switzerland are generally made for the calendar year, and since the reports, as mentioned above, are more accurate and specific since the 1st of January, 1892, a reproduction of the same as to the importation of wheat may be of interest. I copy the following table from the report of the customs department of Switzerland:

Importation of wheat into Switzerland in 1892 and the first six months of 1893.

From—	1892.		Six months of 1893.	
	Met. cent.	*Bushels.*	*Met. cent.*	*Bushels.*
Russia	1,891,705	6,936,251	999,715	3,665,622
United States	425,555	1,560,368	205,508	753,529
Austria	402,420	1,475,540	260,165	953,938
Lower Danubian states	300,681	1,102,497	62,537	229,303
European Turkey	22,011	80,707	5,799	21,263
France	12,530	45,943	3,207	11,759
Other countries	25,542	93,654	19,142	70,187
Total	3,080,444	11,294,960	1,550,073	5,705,601

PRICES OF HUNGARIAN, AMERICAN, AND RUSSIAN WHEAT.

The price of Russian and American wheat is substantially the same in the markets of Switzerland, as already mentioned, but the Hungarian always brings a higher price, as will appear from the following quotations at the Zurich Grain Exchange for the year 1892:

Average monthly quotations of Hungarian and American wheat during the year 1892 (per bushel).

Month.	Hungarian.	American.
January	$1.55	$1.42
February	1.51	1.42
March	1.50	1.39
April	1.43	1.30
May	1.40	1.29
June	1.36	1.25
July	1.29	1.18
August	1.26	1.17
September	1.21	1.10
October	1.21	1.10
November	1.18	1.08
December	1.18	1.06
Average	1.34	1.23

EXCHANGE FACILITIES.

Monetary exchange is effected through the medium of banks of exchange, the same as in the United States. Contracts are generally closed in the currency of this country (francs) and payments made by draft on Paris or Mannheim (Germany) at the regular rate of exchange.

SHIPPING FACILITIES.

Facilities for shipping are ample and favorable for direct trade between the two countries. Shipments can be made from any American port by sailing vessel or steamer to Havre or other French ports on the Atlantic coast, thence by rail to place of destination; or to Antwerp or Rotterdam by vessel, thence by river boat to Mannheim and by rail to place of destination; or by vessel to Genoa (Italy) and from there by rail to Switzerland. The rate of freight by steamer to Havre is about 8 cents per 100 pounds of grain and 80 cents per barrel of flour; from New York or Baltimore to Antwerp or Rotterdam from 5½ to 6 cents per bushel of wheat and from 24 to 36 cents per barrel of flour.

OBSTACLES TO TRADE.

The obstacles in the way of the extension of trade in American flour are:

(1) The import duty of 2.50 francs (48.25 cents) per metric centner (220 pounds) of flour, while the duty on wheat is only 5.8 cents on the same weight of grain, or 1.6 cents per bushel. This discrimination, I suppose, is made solely in the interest of the millers of this country and accounts mainly for the insignificant importation of the milled product in comparison with the importation of the grain.

(2) The prejudice of the people against the use of American flour. The opinion that the bread made of the American flour lacks the nutritive qualities and pleasant flavor of the bread made of the flour of Russian and Hungarian production seems to be generally prevalent, being nursed by millers and bakers, although, they admit the fine quality and appearance of the flour of American production. Whether this prejudice is justified or not, I am not able to judge, but it is possible that the American flour requires a different treatment from other flour in use here, and that the bakers have not yet learned how to handle it. The principal objection, however, seems to come from the millers, some of whom even go so far as to deny that they grind any American grain, while others admit that they use it in mixture with native wheat or wheat from Russia and the Danubian countries.

The best way to counteract this opposition, remove this prejudice, and extend the sale of American flour and wheat would probably be the establishment of agencies in the principal cities of Switzerland for the purpose of demonstrating the fact that just as good bread can be made of American flour as of the flour of any other country. The Industrial Cantonal Exposition, which will be held at Zurich from the 15th of June to the 15th of October of this year (1894), the Agricultural Exposition at Berne in 1895, and the Federal Exposition at Geneva in 1896, will furnish excellent opportunities for this purpose, which should not be neglected by those interested in the flour and grain trade of the United States. The people from all parts of the country will visit one or more of these expositions, and, as the inhabitants of Switzerland are generally intelligent and know a good thing when they see it, it may reasonably be presumed that such establishments, under judicious care and management, would have the most beneficial results.

WM. F. KEMMLER,
Consul.

HORGEN, *January 31, 1894.*

ST. GALL.

STANDARD OF LIVING.

The standard of living in this consular district (comprising the cantons of St. Gall, Thurgau, Appenzell, and Graubünden) is, so far at least as wheat flour is concerned, of the highest. It is claimed by the millers here that American flour, while white and well appearing, lacks the nutritious qualities of flour obtained from the Hungarian wheat. There is undoubtedly in this district some prejudice against American flour. Only the best qualities of flour are used here.

AMERICAN FLOUR AND WHEAT.

It can not be definitely ascertained from statistics covering this special district whether any American flour was imported during the years 1891 and 1892; the statistics for 1893 are not yet published.

The imports of American wheat into this district amounted to 441 pounds and 35,400 pounds in 1891 and 1892, respectively; the statistics for 1893 are not available.

From other countries wheat flour was imported into this district as per the following table:

Whence imported.	1890.	1891.	1892.	Total.
	Kilograms.	*Kilograms.*	*Kilograms.*	*Kilograms.*
Austria-Hungary	1,600	2,000	1,500	5,100
Bavaria	1,400	1,200	700	3,300
Baden	100	264	600	964
France		100	710	810
Würtemberg		350	136	486
Italy		400	225	625
Total	3,100	4,314	3,871	11,265
In English pounds	6,834	9,510	8,534	24,879

From other countries wheat, corn, and barley (wheat can not be given alone) were imported into this district as per the following table:

Whence imported.	1890.	1891.	1892.	Total.
	Kilograms.	*Kilograms.*	*Kilograms.*	*Kilograms.*
Austria-Hungary	218,950	157,500	104,000	480,450
Russia and Roumania	61,000	86,804	66,525	214,329
Servia	3,100	700		3,800
Würtemberg		100		100
Total	283,050	245,104	170,525	698,679
In English pounds	624,012	540,356	375,939	1,540,308

DUTIES.

The import duty on American flour is 2 francs (38.6 cents) per 100 kilograms (220 pounds). The import duty on American wheat is 30 centimes (6 cents) per 100 kilograms. The import duty on wheat flour from other countries is the same as on that from the United States, except that French wheat flour is compelled to pay a duty per 100 kilograms of 2.50 francs (47 cents). This is by way of retaliation for the high French duties against Swiss products. The import duty on wheat from other countries is the same as on that from the United States.

EXCHANGE FACILITIES.

The facilities for monetary exchange here are good. Excellent banks exist everywhere in the district. The ordinary rate of exchange on New York is one-fourth of one per cent. It is suggested that arrangements might be made for direct payment to the American wheat-exporters through the Swiss embroidery houses, which are numerously represented in New York, thus avoiding the troubles of remittance and exchange.

FREIGHT RATES.

American wheat flour and wheat are imported into Switzerland via Antwerp and Rotterdam; none via any other port. The freight rates are as follows per 1,000 kilograms (2,204 pounds) from Antwerp and Rotterdam to points in Switzerland:

To—	From Antwerp.		From Rotterdam.	
	Wheat flour.	Wheat.	Wheat flour.	Wheat.
Basle	$5.52	$4.46	$6.63	$5.27
Olten	6.39	5.39	7.56	6.20
Berne	6.68	6.70	9.10	6.70
Romanshorn	6.92	5.68	8.03	6.23
Zurich	7.05	5.97	8.16	6.56
St. Gall	7.84	6.34	8.65	6.82
Geneva	12.06	7.69	13.18	7.72
Rorschach	7.24	5.98	8.33	6.55

OBSTACLES TO TRADE.

Hungarian flour is flooding the market in this district. It is of good quality and very cheap. The actual present price of wheat per 100 kilograms (220 pounds) is 17 to 19 francs ($3.28 to $3.67), with a reduction expected. The business is now dull in consequence. It is dull also for the reason that the embroidery and other trade with the United States is stagnant, and the laboring classes here are eating corn bread and potatoes in lieu of wheat bread. The general stagnation of trade with the United States arises from the depression in business in the United States, which has been so marked a feature of the past six months. Besides the foregoing obstacles to American trade in wheat and flour with Switzerland, there is the further one of freight rates. American wheat and flour come here via Antwerp and Rotterdam, involving both an ocean freight and a car freight.

TRADE OUTLOOK.

The prospects now are not of the brightest for extending the sale of American flour, at least in this district. This for the reasons stated in the answer last above. Other parts of Switzerland may not be subjected to these obstacles to the same extent. It is further suggested that possibly shipments of wheat and flour via Genoa might have some advantages in car freights over shipments via Rotterdam and Antwerp, although the fact is that at present no shipments from America are thus made.

THE SWISS GRAIN TRADE.

The following is a summary of an article on the Swiss grain trade of 1893, contributed by a leading grain dealer to the Zurich Zeitung for January 10, 1894:

The Swiss grain yield for 1893 was medium in respect to quantity and quality. Taking 100 as representing a full yield, the yield for 1893 may be stated as follows: Wheat, 85 per cent, or 800,000 metric centners;* rye, 80 per cent, or 435,000 metric centners; oats, 70 per cent, or 420,000 metric centners. The total value of the yield was 30,000,000 francs ($5,790,000). There were imported into Switzerland of the above kinds of grain about 4,500,000 metric centners, valued at 90,000,000 francs ($17,370,000). During the first six months of 1893 much American wheat came to Europe and prices kept dropping. Reports from the United States received about May 1, 1893, were that the coming crop probably would be short. In Europe at the same time there was great lack of rain. Prices therefore advanced. But the reports from America proving exaggerated, prices again fell. The Russian grain tariff difficulty with Germany came on about August 1, 1893. In consequence, German holders of Russian wheat sold it to Switzerland at almost any price. In addition to this, by reason of the monetary crisis in the United States, American wheat sold here for prices so low as to be without parallel. During all this period, however, Hungarian wheat sold in eastern Switzerland at fair prices. This was because (1) the Hungarian crop was light, and (2) because eastern Switzerland prefers Hungarian wheat to any other.

At the close of 1893 the stock of wheat in the elevators at Buchs, Romanshorn, and Rorschach (Buchs is in the Rhine Valley near Austria and Romanshorn and Rorschach on the Lake of Constance) was not large—perhaps some 600 cars—while in Brunnen, Morges, and Geneva there were some 5,000 cars. It is not thought that the trade will soon improve, as it is not controlled by sufficient capital. During the depression of 1893 the milling business of eastern Switzerland was good. The warehouses were full, and millers were not required to carry large stocks. In eastern Switzerland flour prices, as compared with wheat prices, were very good. Foreign wheat still seeks our market in enormous quantities; the competition therein is therefore great and the prices ruinous.

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*1 metric centner = 220.46 English pounds.

IRVING B. RICHMAN,
Consul-General.

ST. GALL, *January 18, 1894.*

THE UNITED KINGDOM.

BIRMINGHAM.

The standard of living in this district of England (known as the Midlands) is probably higher, on the average, than among any other like number of people in the United Kingdom. Owing to the fact that the district contains only one large city, there is probably less than the average amount of poverty, that is, of persons not able by their labor to procure the necessaries of life in fair measure. The district is one with a great variety of industries and, as a consequence, is less subject to severe financial depression than the average. Although it is a center for so many manufacturing industries, agriculture is still more important, relatively, than in any other part of England containing the same number of people.

It is, of course, impossible to separate the entire food consumption of the district from that of the whole of England or even to ascertain, with anything like accuracy, its relative amount; but, as it produces more than its share of wheat according to population, it is naturally less dependent upon imported wheat and flour for its supply of bread. During the continuance of the tax on grain of all kinds wheaten bread was considered something of a luxury among certain portions of the working population, whether artisan or agricultural. At that time black bread, made mainly from rye or beans, was the food of a large number of people. But the removal of the tax changed all that, until the people of England have reached what may be termed the white-bread standard. One sees very little rye bread or black or mixed breads of any sort in the shops, and, as the use of meat is not perhaps so large among these elements of the population as it is among the same kind of workers in the United States, the workingmen of England have come more and more to use bread made from wheat flour. It has been estimated by competent authorities that the per capita consumption of wheat and wheat flour in the United Kingdom increased from about 311 pounds in 1850 to 340 pounds in 1880.

The total imports of flour into the United Kingdom have increased by about 39 per cent during the four-year period [*sic*], while the amount received from the United States has increased by 79.1 per cent. There is thus manifest a tendency to import more of the breadstuffs in the form of flour ready for consumption, a fact which has had a depressing effect upon the milling industry in general throughout England. There is no remaining prejudice against flour from the United States, and many brands have acquired here the same popularity that they have long enjoyed at home.

Not only are there no apparent obstacles to the sale of wheat and flour produced in the United States, but, on the contrary, there is a growing dependence upon us for breadstuffs by the people of the United Kingdom. It is not easy to see how the conditions that produce this result are to be changed. Unfriendly trade legislation might have some effect temporarily, and before the relations of the two countries had readjusted themselves to radical changes; but a single bad crop all over Europe would even then do much to counteract such conditions. A nation trading with all the world, as does the United Kingdom, is not likely to ask where its breadstuffs come from in a year of failure or when its own production is constantly diminishing. Of course, it must be evident that unfriendly legislation—a failure to recognize the universality of the law that in order to sell we must buy—would have a tendency to restrict our selling to times of necessity and thus to make the demand more fitful and uncertain than it would be if there was less interference with fairly established trade relations.

Nothing seems to be more completely established than the dependence of the people of Great Britain upon the United States for a considerable part of their supply of breadstuffs, and this dependence is far more likely to increase than to diminish.

Owing to the fact that the metes and bounds of consular districts are not fixed, it is somewhat difficult to give accurate returns, especially when the district is located in the interior, and so makes no direct importations. In general, the Birmingham district draws its business from the counties of Hereford, Huntingdon, Leicester, Northampton, Oxford, Salop, Stafford, Warwick, and Worcester. Some points in these counties would naturally transact business relating to the United States at other consulates, but these would be balanced by places in a considerable portion of Wales and in other English counties that would naturally come here; so that for statistical purposes it will be approximately correct to take these counties as the district, and to assume that the number of people in them is the number fairly tributary to the Birmingham consulate and its agencies.

The population of these counties by the census of 1891 was 2,786,261, or about one-tenth of the population of England alone and a fraction less than one-fourteenth of the entire population of the United Kingdom.

The area of England is 32,527,070 acres; that of the district 5,019,595 acres.

The acreage of wheat in Great Britain for the period from 1889–'93 is shown by the following table:

Division.	1889.	1890.	1891.	1892.	1893.
	Acres.	*Acres.*	*Acres.*	*Acres.*	*Acres.*
England	2,321,504	2,255,694	2,192,393	2,102,969	1,798,869
Wales	68,464	68,669	61,590	55,278	54,562
Scotland	59,386	61,973	53,294	61,591	44,093
Total	2,449,354	2,386,336	2,307,277	2,219,838	1,897,524

The acreage of wheat in the Birmingham district by counties, and the population of each for the years 1889–'92 (the returns for 1893 by counties not being yet available), were as follows:

Counties.	Population.	Area.			
		1889.	1890.	1891.	1892.
		Acres.	*Acres.*	*Acres.*	*Acres.*
Hereford	113,391	38,346	36,938	34,606	30,854
Huntingdon	50,290	37,122	37,739	37,344	35,806
Leicester	189,607	27,974	28,138	27,804	24,220
Northampton	308,149	55,814	55,871	54,300	51,988
Oxford	94,143	48,166	45,923	44,732	42,880
Salop	254,745	51,828	50,037	47,227	42,931
Stafford	551,661	33,438	30,689	28,686	26,460
Warwick	801,760	47,030	46,095	44,036	41,729
Worcester	422,515	44,304	43,186	41,145	38,279
Total	2,786,261	384,022	374,616	359,880	335,147

It will be seen that while the area for England was 2,102,969 acres in 1892 and the average for the four-year period was 2,340,701 acres, the area sown to wheat in this consular district for the same year was 335,147 acres and the average for the period was 363,416 acres.

The total production of wheat in Great Britain for the period 1889–'93 and in the district by counties for the period 1889–'92 is shown by the following tables:

Production of wheat in Great Britain.

Division.	1889.	1890.	1891.	1892.	1893.
	Bushels.	*Bushels.*	*Bushels.*	*Bushels.*	*Bushels.*
England	69,336,374	69,442,417	68,694,456	55,107,186	46,429,407
Wales	1,672,557	1,712,541	1,461,740	1,318,763	1,205,006
Scotland	2,193,842	2,199,526	1,971,067	2,134,983	1,612,884
Total	73,202,773	73,354,484	72,127,263	58,560,932	49,247,297

Production of wheat in Birmingham consular district by counties.

Counties.	1889.	1890.	1891.	1892.
	Bushels.	*Bushels.*	*Bushels.*	*Bushels.*
Hereford	992,350	1,103,522	1,022,778	816,814
Huntingdon	991,837	1,161,732	1,203,891	850,409
Leicester	871,054	898,173	911,853	652,985
Northampton	1,625,051	1,817,840	1,764,745	1,347,817
Oxford	1,393,737	1,436,752	1,334,380	965,960
Salop	1,617,840	1,576,285	1,473,360	1,284,686
Stafford	940,293	908,498	837,505	796,491
Warwick	1,371,352	1,429,883	1,350,607	1,127,904
Worcester	1,234,511	1,383,321	1,267,892	1,089,604
Total	11,038,025	11,716,006	11,167,011	8,932,670

While the production of wheat in England was 55,107,186 bushels for the year 1892 and the average for the years 1889–'92 was 69,311,363 bushels, the nine counties included in the district produced 8,932,670 bushels in 1892 and an average of 10,713,428 bushels for the same period. Thus, if the district had produced its one-tenth share of the wheat of England, it would have grown about 5,500,000 bushels in 1892, while, in fact, its product was more than its proportion by nearly 3,500,000 bushels. Its people were therefore less dependent upon an outside supply of wheat and flour for their bread, assuming the rate of consumption to be the same, than were those of Great Britain itself taken as a whole.

The Midland district has therefore not only maintained and developed its manufacturing industries, but its wheat-growing industry has suffered less, according to population, than any other part of England. Its people have therefore more nearly produced their own supply of bread, considering their great artisan population, which produces no breadstuffs, than any other part, except perhaps in those counties and districts almost purely agricultural.

The decline in the acreage and production of wheat in the United Kingdom has gone on pretty steadily since 1870, the rate of diminution being even more rapid in Wales, Scotland, Ireland, and the various small islands than in England itself. Thus in the period 1871–'75, of the wheat acreage of the United Kingdom, 87.9 per cent belonged to England, but in 1893 this proportion had risen to 92 per cent. The losses in each of the divisions of the Kingdom may be shown by a comparison of the figures given for 1892 and 1893 of the areas under wheat in each division and in the entire Kingdom.

Wheat production in United Kingdom, 1892–'93.

Division.	1893.	1892.	Decrease.
	Acres.	*Acres.*	*Acres.*
England	1,798,869	2,102,969	304,100
Wales	54,562	55,278	716
Scotland	44,093	61,592	17,499
Ireland	54,988	75,344	20,356
United Kingdom (including Isle of Man and Channel Islands)	1,955,213	2,298,607	343,394

The fluctuations in the extent of the wheat area in England alone for the ten years 1884–'93, together with the increase or decrease each year, is shown by the following table:

Year.	Area.	Increase.	Decrease.
	Acres.		
1884	2,530,711	64,115	
1885	2,349,305		181,406
1886	2,161,126		188,179
1887	2,197,580	36,454	
1888	2,418,674	221,094	
1889	2,321,504		97,170
1890	2,255,694		65,810
1891	2,192,393		63,301
1892	2,102,969		89,424
1893	1,798,869		304,100

The decline is still more marked when the 3,737,140 average acreage in the United Kingdom for the five-year period 1871–'75 is compared with the 1,955,213 acres devoted to wheat in 1893, showing a loss of 1,781,927 acres, or more than 47 per cent, in twenty-three years.

The following table shows the diminishing average yield and the constantly declining price from 1885 to 1893:

Year.	Yield.	Increase on previous year.	Decrease on previous year.	Yield per acre.	Average price per imperial quarter.	
	Bushels.	*Bushels.*	*Bushels.*	*Bushels.*	*s.*	*d.*
1885	74,021,248			31.51	32	10
1886	58,071,171		15,950,077	26.87	31	0
1887	70,874,902	12,803,731		32.25	32	6
1888	68,159,216		2,715,686	28.18	31	10
1889	69,336,374	1,177,158		29.87	29	9
1890	69,442,417	106,043		30.79	31	11
1891	68,694,456		747,961	31.33	37	0
1892	55,107,186		13,587,270	26.2	30	3
1893	46,429,407		8,677,779	25.81	28	4

Wheat, which has always held first place in the agriculture of England, has now lost its position of primacy, being succeeded by oats, there being 1,914,373 acres of the latter cereal in 1893 to 1,798,869 acres of wheat. Even during a period so recent as 1876–'80 the area devoted to wheat was more than twice as much as that given to oats. This disproportion has been lessening continually until 1892 the acreage of wheat, oats, and barley was very nearly the same. The latest development proves that oats and wheat have changed places, and it is generally believed permanently. But the land lost to wheat culture does not all find employment by being sown in other cereals. Compared with 1892, in 1893 there were grown 190,925 acres more of oats and barley; but this still leaves a large area lost to grain culture of any kind. Some of it is accounted for by land permitted to lie fallow, but most of it by the increase in the area devoted to permanent pasturage, a large part of this increase lying in the drought-stricken counties in the south of England. The short crops, not only in Great Britain, but throughout Europe, in 1891, the great yield in India the same year, and the abnormal crops in the United States in 1891 and 1892 have naturally had a great effect in further diminishing the area devoted to wheat, while the profit from this cereal has been constantly declining. Even the small production in the United States in 1893 and the great reduction in area and production in England during the same year have not had the effect of increasing prices, so that there is little in the situation to encourage the farmer of England to return to wheat-growing and thus seek to restore it to its old primacy among agricultural products.

The importation of wheat and flour into the United Kingdom can be best shown by two compact tables dealing separately with these articles. For these I am under obligation to Mr. Robert Giffen, C. B., secretary and statistician to the commercial department of the Board of Trade.

Imports of wheat into the United Kingdom during the years 1889–'93.

Years.	Total imports.		From the United States.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.		*Cwts.*	
1889	58,551,887	£22,510,502	17,009,036	£6,819,175
1890	60,474,180	23,583,844	17,201,063	6,894,807
1891	66,312,962	29,448,204	24,194,955	11,086,838
1892	64,901,799	24,857,902	33,886,742	13,251,275
1893*	65,417,308	21,193,648	32,262,851	10,610,530

Years.	From Russia.		From British India.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.		*Cwts.*	
1889	21,310,304	£8,000,394	9,218,204	£3,405,284
1890	19,389,025	7,481,537	9,111,582	3,461,071
1891	14,552,905	6,433,804	13,005,785	5,507,526
1892	4,362,986	1,470,425	12,495,442	4,812,180
1893*	10,061,988	3,095,501	6,183,508	2,051,816

* The figures for 1893 are subject to correction on final revision of the accounts.

It will be seen that, while the total imports of wheat have increased from 58,551,887 cwts. in 1889 to 65,417,308 cwts. in 1893, or about 11.7 per cent, the amount supplied by the United States has risen from 17,009,036 cwts. in 1889 to 32,262,851 cwts. in 1893, an increase during the period of more than 89.6 per cent. This includes three bad harvests in England and two unusually large ones in the United States. Comparing the last year of the period with the first, the supply from Russia has declined rather more than one-half, and that from India about one-third.

Imports of wheat flour into the United Kingdom during the years 1889–'93.

Years.	Total imports.		From the United States.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.		*Cwts.*	
1889	14,672,082	£8,543,908	10,043,720	£5,661,663
1890	15,773,336	9,074,288	12,025,800	6,734,008
1891	16,723,003	10,184,887	13,703,035	8,229,595
1892	22,106,009	12,267,453	19,467,391	10,686,558
1893*	20,408,168	9,761,510	17,995,601	8,400,236

*The figures for 1893 are subject to correction on final revision of the accounts.

GEORGE F. PARKER,
Consul.

BIRMINGHAM, *January 25, 1894.*

BRADFORD.

STANDARD OF LIVING.

The standard of living in this consular district is high. The people have four and sometimes five meals per day, viz, breakfast in the morning, dinner or luncheon at noon, tea at 5 p. m., and supper at 8 or 9 o'clock in the evening. Some vary this with dinner in the evening and another lunch before retiring at night. At the morning repast and at tea, bread is consumed in large quantities. They are ready for American flour if it can be placed before them in the proper manner. Its introduction must be brought about by personal solicitation, advertising, and the usual methods known to enterprising business men.

AMERICAN WHEAT AND FLOUR.

The flour most used is a "fair upper grade," followed largely by a good consumption of "patents."

The millers who grind American wheat and the dealers who sell American flour in this district do not import direct, but buy their supplies from the importers at Liverpool, Glasgow, and Hull. American-ground flour is used to some extent, but comes into the district so indirectly that it is impossible for me to make an estimate that would be worthy of attention. Some dealers buy it in the open market at Liverpool and mix it with other flours, but the great majority buy and sell a flour of the origin of which they are entirely ignorant. Local millers mix their wheat and use about one-fourth American, the rest being an admixture of Russian, Indian, English, and, occasionally, a little Australian. There are about 2,000,000 people in this consular district. From the facts which I have been enabled to gather, I estimate that their consumption of flour from American wheat ground by English millers represents about 100,000 bushels per annum for the last three years. This includes grain from Canada and South America. This wheat is mostly distributed by Liverpool and Hull brokers.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are all that could be desired, and for forwarding grain or flour to towns in this district the facilities by rail from the various seaports are in all respects admirable.

OBSTACLES TO TRADE.

There are no obstacles in the way of the extension of trade in American flour in this district that can not be overcome by persevering enterprise. Mr. John Hetherington, of No. 12–16, Aldermanbury, Bradford, to whom I am indebted for a great deal of information, attempted the introduction of United States flour twenty years ago. At that time it was accounted too dry to use alone, especially if made from spring wheat. The second day after baking it became very dry. Some complained also that it was strong. On the other hand, flour made from winter wheat was deficient in color.

It has been found that a blend of the hard American wheats with mellow English and a mixture of Russian produces a flour which, when made into bread, would keep in a fairly mellow condition four or five days. The quality of bread made from American flour alone was good, but dry. It is the opinion of merchants here that our flour would be used in abundance if these difficulties could be overcome. Mr. Hetherington states that a great improvement has been noticed in this direction since he first tried United States flour two decades ago.

To improve color the local millers wash their wheat before grinding, and the American grain stands the process better than any other. This is especially true of the winter wheat. The washing cleans it in a perfect manner and makes it softer. If spring-wheat flour could be made mellower, a great advantage would also accrue to it.

In all those districts in Great Britain where the people are supplied with bread by bakers the conditions for American flour are most favorable. This is the universal custom in Scotland and in all the counties of England, save Yorkshire, Durham, and Northumberland. In these last mentioned counties the vast majority of householders bake their own bread. Therefore, it follows that, not having the same facilities for mixing and baking as the bakers, they follow old customs and do not achieve as good results. In Lancashire, which joins Yorkshire, the people are supplied by bakers and probably fivefold more American flour is used in that county than in Yorkshire. The Lancashire bakers use 50 per cent of American flour, probably more in some cases. This they mix with other foreign or the native English flour. Two flours always "work" better than one, and this mixture produces what is termed "a beautiful loaf." Minnesota flour, in this connection, is highly spoken of. Some of the advantages of this system of mixing might be successfully taught to Yorkshire housekeepers, including those in the Bradford consular district. All the obstacles mentioned by dealers and consumers are pointed out in the foregoing.

A SUGGESTION.

There is one wheat product created in the process of flour-making that is much in vogue here. That is bran. The "broad" bran is wanted. It commands the same price, weight for weight, as low-grade American flour, and there is a strong demand. The only trouble is to obtain a sufficient supply. Samples of United States bran received show it to be too small in its particles. It must be broad, like the English, and clean. It is used for feeding cattle and horses. The impression here is that Americans grind their wheat for the flour only. Pollard or sharps are also in demand for "feed." At one time this product sold for more than flour now brings.

If any American millers can meet this demand for bran of the grade here pointed out, and will apply through the Department of State, I will gladly furnish the names and addresses of persons who will buy liberally.

PROSPECTS.

In my opinion, the prospects for doing a more extensive business in American flour in this country are entirely dependent upon the enterprise, progressiveness, and sagacity of the exporters. The field is here waiting to be cultivated. The English character has been described as "doggedly conservative," but it gives way to perseverance and enthusiasm. In every instance where a determined effort has been made to introduce American goods into this town it has been successful. Notably has this been the case with our various tobacco products, oysters, fresh and canned fruits, cheese, ham, bacon, beef, and pickled and canned meats. Why not with our flour?

CLAUDE MEEKER,
Consul.

BRADFORD, *January 15, 1894.*

CARDIFF.

STANDARD OF LIVING.

The standard of living in this district is good, and compares favorably with any district in Great Britain. Ninety per cent of the flour consumed is American and other foreign flour, and this is generally of the best quality.

IMPORTS OF FLOUR AND WHEAT.

The American flour consumed in this district is not imported direct.

The quantities of American wheat imported into Cardiff were 100,274, 322,518, and 824,845 cwts. for the years 1891, 1892, and 1893, respectively.

The quantities of foreign flour, American not included, imported were 32 cwts. in 1892 and 18 cwts. in 1893; none in 1891. The quantities of foreign wheat, American not included, imported were 1,812,413, 1,192,762, and 1,984,363 cwts. in 1891, 1892, and 1893, respectively.

EXCHANGE AND SHIPPING FACILITIES.

Banking facilities are good.

Shipping facilities are not as good as those possessed by Bristol; hence the supplies for this district are obtained mostly from that port and from the ports of Portishead, Gloucester, and Sharpness, all in the Bristol district. The importation of grain and flour to the latter ports is on an extensive scale, owing to their proximity to a large area in the Midlands; besides, they have every facility for receiving and storing which the ports of South Wales have not.

OBSTACLES TO TRADE.

The only apparent drawback is the want of better docking facilities, which, of course, does not enhance the prospect of increased trade as regards shipments direct to Welsh ports. Otherwise the trade prospects are good.

ANTHONY HOWELLS,
Consul.

CARDIFF, *January 20, 1894.*

DUBLIN.

STANDARD OF LIVING.

In my consular district there is much poverty among the classes of unskilled laborers—as great, I presume, as in the average European community—but the standard of living among all classes, measured by the quality of wheat and flour used in bread consumption, is very high. There is little or no demand for any grades of flour except the best spring and winter patents, and of wheat the shipments to this port are chiefly prime grades. Most of the secondary grades brought here are to supply army contracts. Two causes contribute to the almost exclusive use in this district of high-grade flour and wheat; one is the phenomenally low price of wheat and flour, the other the fact that almost the whole of the bread consumed in Ireland is furnished by baking companies between whom rivalry is very keen, compelling a fine quality of bread at a minimum price. I may mention that the bakers of Dublin have a reputation for furnishing bread of an excellence unsurpassed anywhere by the bakers' trade. They are now retailing a 2-pound loaf of the best bread for 2½*d.*, or 5 cents.

My further report will show that American wheat and wheat flour supply this market almost exclusively, and that the use of American flour is gradually encroaching upon the wheat trade. American flour is in good repute here, and its present low price leaves little or no profit to the Dublin miller. The one factor alone which permits the miller here to continue in business is the high price he can secure for the refuse, the bran in this market being worth from $30 to $35 per ton of 2,240 pounds. One of the large milling and baking companies here, which consumes annually about 22,000,000 pounds of flour in their bakery, buys about one-third of this amount in flour, although they would rather manufacture the whole amount themselves if the price of wheat relative to the price of flour would permit.

QUALITY OF FLOUR USED.

There is but little demand for any but the best winter and spring wheat patents. The red winter and spring wheats produce a flour which is in the ascendency in this market, the preference being in favor of the spring-wheat patents. The bakers here profess a preference for flour from the Australian wheat, claiming that the bread therefrom is sweeter in taste and finer in flavor. This preference may be due to the fact that they have no flour trade from that source to compete against. The Australian wheat, however, in this market at the present time commands from 4*s.* to 8*s.* per long ton more than the American wheat. Austrian flour is used to a limited extent, and is the highest priced of any flour in the market; but the supply is a diminishing one, the import into the United Kingdom for 1893 being 1,099,614 cwts., or about one-seventeenth of the flour trade of the United States to the

United Kingdom. In this market the Austrian flour sells at from $5 to $10 per ton more than does the best American; and the average price per ton for all grades of Austrian flour finding a market in the United Kingdom is from $22 to $24 higher than the average price of all grades of American flour sold in this market.

IMPORTS OF FLOUR AND WHEAT.

The following statistics will show the wheat and flour trade at the chief ports in this consular district for the dates given:

Wheat flour and wheat imported at the ports of Dublin, Galway, and Limerick for the years ending June 30, 1891, 1892, and 1893, and showing the countries from which imported.

DUBLIN.

Countries.	1891.	1892.	1893.
Flour.			
United States:	*Cwts.*	*Cwts.*	*Cwts.*
Atlantic	106,069	477,697	559,069
Pacific	188,200	78,820	168,980
Total	294,269	556,517	728,049
Austria	71,200	44,905	32,700
France	7,885	494	4,610
Germany	2,475	....	40
Other countries	81,560	45,399	37,350
Total	457,389	647,315	802,749
Wheat.			
United States:			
Atlantic	47,400	468,470	480,740
Pacific	873,170	675,580	867,380
Total	920,570	1,144,050	1,348,120
South America	38,160	....	....
Russia	714,820	538,060	142,340
Australasia	372,460	433,280	316,720
Germany	25,250	....	....
Roumania	74,760	....	....
Other countries	1,225,450	972,340	459,060
Total	3,371,470	2,987,730	2,266,240

GALWAY.*

Flour.			
United States:			
Atlantic	....	40,519	....
Pacific	66,524	111,303	200,078
Total	66,524	141,822	200,078
Wheat.			
United States:			
Atlantic	....	....	33,819
Pacific	5,952	42,545	23,743
Total	5,952	42,545	57,562

* First six months of 1891.

Wheat flour and wheat imported at the ports of Dublin, Galway, and Limerick for the years ending June 30, 1891, 1892, and 1893, etc.—Continued.

LIMERICK.*

Countries.	1891.	1892.	1893.
Flour.	*Cwts.*	*Cwts.*	*Cwts.*
United States (Pacific)	113,640	25,420	70,000
Wheat.			
United States (Pacific)	700,000	600,000	800,000
All other countries	520,000	454,000	900,000
Total	1,200,000	1,054,000	1,700,000

* Estimated.

The above returns show the direct imports only. There is also a cross-channel trade in wheat and flour from English and Scottish ports to the Irish ports. The chief cross-channel trade in wheat and flour to Dublin comes from Liverpool and Glasgow. Large dealers at those ports have their agents here, to whom portions of their imports are consigned by the cross-channel steamers. No record of the quantities so shipped is kept by either the customs or the port and dock officials at Dublin, as the returns are made to the statistical department from the ports of entry. Estimates, based upon information obtained from the principal agents and factors here, indicate that the cross-channel flour trade amounts to 25 per cent of the direct flour shipments to this port, and the cross-channel wheat trade to 10 per cent. Exact figures upon the cross-channel trade, while not obtainable, do not affect the accuracy of the returns upon the imports of wheat and flour to the United Kingdom. The importance it has is two-fold: First, to show the actual consumption of wheat and flour at this port, and, second, to afford a safe basis for comparing the growth of the flour trade. Adding 25 per cent to the direct flour trade at Dublin and 10 per cent to the direct wheat trade, and estimating that the different countries have contributed in the same ratio, the receipts at this port would be for the periods named in the customs returns as follows:

Countries.	1891.	1892.	1893.
Flour:	*Cwts.*	*Cwts.*	*Cwts.*
United States	370,336	695,646	910,061
Other countries	101,950	56,748	46,687
Wheat:			
United States	1,012,627	1,148,455	1,482,932
Other countries	1,347,995	1,069,574	504,966

The above comparisons are, of course, subject to variations. From the best information obtainable the cross-channel trade in wheat and flour is decreasing from year to year, owing to the better facilities for direct importation now afforded by the Lord line steamers plying between this port and the Atlantic ports of the United States. American wheat and flour also supply a larger part of the cross-channel trade than is estimated in the above comparison between countries. The above estimates, however, are believed to be substantially correct for the purpose of showing the growth of the flour trade at this port, and the more confidence can be placed in them from the fact that they are in accord with the experience of the principal dealers here engaged in the wheat and flour trade. It will also be seen by the above comparisons that in the years ending, respectively, June 30, 1891, 1892, and 1893, flour received at the port of Dublin held a ratio to wheat received of nearly 1 to 5, 1 to 3, and 1 to 2. If we abandon the cross-channel estimates and confine comparisons to the customs returns, the ratios will be nearly 2 to 11, 3 to 10, and 5 to 12.

The imports of wheat and flour into the United Kingdom for the years ending, respectively, December 31, 1891, 1892, and 1893, were:

Year.	Flour.	Wheat.
	Cwts.	*Cwts.*
1891	16,723,203	66,312,962
1892	22,106,209	64,901,799
1893	20,408,168	65,417,308

This shows a ratio of nearly 25 to 100, 34 to 100, and 31 to 100, indicating that the ratio of flour to wheat consumed in this district is greater than for the average for the other ports of the United Kingdom.

EXCHANGE AND SHIPPING FACILITIES.

Monetary exchange is on London. In the wheat and flour trade drafts are drawn at sixty days' sight, and are accompanied by invoice and bill of lading. No credit is asked or given, hence the miller is in possession of his money usually before the consignee is in receipt of the shipment. Consignments to commission firms are not regarded with favor here, and, if practiced at all, it is upon a very limited scale.

As to shipping facilities, the Dublin harbor accommodates ships of the largest burden, and the greater part of the wheat and flour shipments designed for this port are now sent direct, although, as has been stated elsewhere, there is still a considerable, though decreasing, cross-channel trade from Liverpool and Glasgow chiefly. The cross-channel trade has one important advantage over the direct importation, namely, the companies engaged in that trade afford storage room for shipments received by them, while there are no transit-shed accommodations provided for direct importations; consequently the consignee must be prepared to receive and store his consignment as fast as unloaded from the vessel. Wheat and flour from the Pacific coast are consigned to this port usually by sailing vessels. There is now a large direct trade from the Atlantic coast chiefly conducted by the Lord line of steamers. Since the establishment of this direct line of communication the trade in both wheat and flour from the Atlantic ports of the United States has steadily and greatly increased. A part of this increase has been at the expense of the Pacific coast trade, and, in the opinion of some of the largest dealers here, has operated toward lower prices because of keener competition through the opportunity afforded to small dealers to place their orders direct. In this view, the direct steamship communication with Atlantic ports has resulted in a larger trade, but a trade done at a loss to both the American millers and the Dublin wholesalers.

OBSTACLES TO TRADE.

The obstacles in the way of the American flour trade in this district are slight. The chief obstacle seems to be the uncertainty of arrival of shipments, as there are no fixed sailings to this port. There is also some complaint of damage, chiefly weather damage, to flour while in transit on American railways. This damage is computed to reach about one-fourth of one per cent. In other respects the outlook is good. The American millers, as a class, enjoy a high reputation for honest dealing and for keeping their leading brands up to a high standard of excellence. Sales are now made chiefly upon the reputation of the brand, and in every case where the quality of an established brand has been lowered the result has been a loss of trade. Hence the American miller's supremacy depends upon his maintaining his present high reputation. I may mention here that in the wheat trade Russia enjoys an advantage over the United States, in that sales from that country are made by sample, and if cargo is not up to sample the loss falls upon the consignor, while from the United States sales are made by grade and the certificate is final; in case of inferior grades, which are not rare, the loss falls upon the consignee.

TRADE OUTLOOK.

As to the prospects for a more extensive business in American flour in this district, little or no prejudice exists against American flour, freights are low, exchange and shipping facilities are good, the reputation of American millers high, and the Irish millers have no marginal profit except as to the offal and thus their competition reaches no farther than the demand for their by-products permit. American flour is practically without rivalry from other countries; and hence the problem of extension depends upon the American farmer and the American weather. The extension of the American flour trade in this district hinges almost entirely upon the quantity and quality of the wheat output in the United States in any given year and the consequent comparative price at which prime flour can be sold. There has been for the past three years in this district a rapid increase each year, but this increase will in all probability be slightly checked this year by the lesser quantity and lower quality of the American wheat crop of 1893. The proposed modification of the present tariff system, if enacted into law, will undoubtedly be a factor in increasing the demand for American flour, as there can be little doubt but that the present tariff system has indirectly crippled the extension of this trade.

The extension of markets for our manufactured products is of great importance, and every legitimate means should be employed by our manufacturers to that end; but it may be questioned if our American millers have not forced their foreign markets to their own loss and to the loss of the American farmers who grow wheat. The average price of American wheat in the United Kingdom in 1893 was about $1.60 per cwt., and for American flour about $2.31 per cwt., or a difference only of about 71 cents between the price of 112 pounds of wheat and the same weight of flour; the above prices in each case being the average for all grades. Commenting upon this feature of the markets, the Corn Trade Year Book says:

> It is extremely doubtful if more than a small percentage of the American flour is ever shipped on a legitimate basis, leaving a direct profit to the miller in the United States. Much of the stuff is consigned to this side in face of the certainty of its being sold under its bare cost and freight; of this there is indubitable proof.

This close competition is forced upon the American millers in part by the high price the millers of the United Kingdom can obtain for the by-product, but a portion of the low prices realized by them is undoubtedly due to an overzeal in forcing their markets. I revert to the matter because of the direct bearing this question has upon the profits of the American wheat-grower. There are some grounds, however, for hope that the wheat and flour market may gradually improve, as the supply from the crop of 1893 seems to be short of the probable demand prior to the availability of the crop for 1894. It may be noted that, while the United States during the winter of 1891–'92 were putting forth great efforts to relieve the sufferings from famine in Russia, Russian merchants, in order to escape the prohibitive ukase against grain exportation, threw upon the markets of the United Kingdom 14,552,905 cwts. of wheat, while their combined exports of wheat for 1892 and 1893 to the United Kingdom were less by more than 100,000 cwts. than for 1891 alone. In 1891 the price of wheat per quarter averaged $9; in 1892 the average price had dropped to $7.30, followed by a drop in 1893 to from $6.32 to $6.56. While other causes contributed to this great decline, without doubt the Russian deluge gave to it the initial velocity.

Before closing this report I wish to acknowledge my obligations to the wholesalers and agents engaged in the wheat and flour trade in this city for their kindness and courtesy in extending to me every assistance in their power. I desire also to append the reports of the consular agents of this district.

ATHLONE.

Consular Agent John Burgess, at Athlone, reports as follows:

I beg to submit the following answers covering the report on the extension of American wheat flour:

(1) Good. Of the flour eaten, 95 per cent is American.

(2) Seventy-five per cent patents and 25 per cent straights.

(3, 4, and 5) Fifteen hundred tons each year.

(6, 7, and 8) None.

(14) Flour for this place is landed at Galway, where shipping facilities are good.

(15) No obstacles exist.

I have to report the imports of wheat and flour at the port of Galway for the years ending December 31, 1891, 1892, and 1893, as follows:

Description.	1891.	1892.	1893.
	Tons.	*Tons.*	*Tons.*
Flour	5,135	7,352	13,088
Wheat:			
American	916	3,163	1,493
Australian	2,214	…………	…………

LIMERICK.

The following is the report of Consular Agent Richard Hogan, at Limerick:

In submitting my report upon the extension of markets for American wheat flour, I beg to state that I found it impossible to procure figures from the local custom-house or from the harbor office upon this important subject. Therefore, I have had to estimate the quantities from such information as I could obtain from merchants engaged in the wheat and flour trade. Of late years the people in this part of Ireland have been large consumers of American wheat flour, which is imported from the United States direct in sailing vessels or brought here by the channel steamers from England and Scotland. The consumption of American flour in Limerick varies from 1,000 to 6,000 tons per annum. I believe this quantity, however, might be much increased.

The obstacles to increased consumption are, in my opinion, want of direct steam communication between the United States and this port and the prejudice that exists in regard to the importation of manufactured goods from any country when such articles can be as well produced at home.

American wheat is largely imported to this port from both the Atlantic and Pacific ports. There is also importation of wheat from the Black Sea, South America, and Australia. The flour manufactured from all these wheats finds a market in the provinces of Munster and Connaught. There was very little wheat from the Black Sea in 1891, but South America was well to the front in that year.

I am informed that in flour the American spring patents are most esteemed, but some cargoes of excellent flour have been imported from Oregon. There is little trade in flour with any country except the United States.

NEWTON B. ASHBY,
Consul.

DUBLIN, *February 8, 1894.*

EDINBURGH (LEITH).

The standard of living in this consular district is generally high, the community being wealthy upon the average. They consume chiefly American flour. First and second grades, for the most part, are used.

American wheat flour and wheat imported.

Year ending June 30—	Wheat flour.		Wheat.	
	American.	Other.	American.	Other.
	*Sacks.**	*Sacks.**	*Cwts.*†	*Cwts.*†
1891	240,051	75,837	293,905	310,303
1892	534,783	58,004	1,933,502	545,202
1893	707,962	90,150	1,455,588	481,497

* 200 pounds. † 100 pounds.

"Sacks" of flour may contain either 140 or 280 pounds. The reports of importations do not discriminate, but merchants estimate 200 pounds as an average "sack." This report covers only direct importations to this port and takes no note of flour from Glasgow by rail. But little comes that way, however, and there are no statistics available.

Every facility exists for monetary exchange at London rates.

The facilities for shipping from the United States consist of a regular line of steamers from New York and one from Newport News; also occasional steamers from Baltimore. Additional vessels are chartered as freights offer.

No obstacles to the extension of trade are known to exist. Trade is limited only by the law of supply and demand. American flour is esteemed best after Hungarian, which makes rather more loaves from the same quantity. The "Pillsbury" is very close to the Hungarian in this respect. Bread is made wholly by bakers, and never in private families. The bakers are therefore the customers who are to be satisfied.

The prospect is that the importation of American flour and wheat will increase. At present prices, competition on the part of British and continental wheat-growers and millers is out of the question. There is some competition from Canada. Even if prices rise, the reputation of American flour will keep it practically at the head of the list. Importations of fine Hungarian flour are diminishing, and the high price demanded for it gives the American product an advantage.

F. H. UNDERWOOD,
Consul.

EDINBURGH (LEITH), *January 26, 1894.*

CORK.

STANDARD OF LIVING.

The standard of living in this consular district is fairly good, there being at this time very few unemployed persons and no distress that calls for special notice. Practically the only form in which public charity has taken definite shape this winter is in respect to the "coal fund," that is, a fund to provide the poor with coal. The consumption of American flour is universal and exceeds that of all other flours.

QUALITY OF FLOUR CONSUMED.

The flour consumed is "medium" to "best" in quality, low grades not being in demand.

AMERICAN WHEAT AND FLOUR IMPORTS.

The following table shows the quantity of wheat and wheat flour imported into the port of Cork during the years ending June 30, 1891, 1892, and 1893:

Country.	Wheat.			Wheat flour.		
	1891.	1892.	1893.	1891.	1892.	1893.
	Cwts.	*Cwts.*	*Cwts.*	*Cwts.*	*Cwts.*	*Cwts.*
Russia (south)	669,068	254,840	177,037			
Germany	22,500			22,200	50	
Roumania	62,730					
South Australia	24,500		29,300			
New Zealand	192,142	30,760	28,800			
United States:						
Atlantic	186,460	713,979	667,148		10,889	114
Pacific	94,881	37,000	78,140		59,440	20,788
Chile		82,468				
Argentine Republic	234,031	860	86,360			
Canada						52

The sale of American flour in Cork city is estimated at 3,000 bags of 280 pounds each weekly. This flour is imported chiefly through Liverpool, possibly small amounts coming through Bristol and Glasgow, between which and this port there are regular lines of coasting steamers.

The flour is sold by the American exporters "C. I. F." (cost, insurance, and freight). It is shipped in bags of 70, 140, and 280 pounds, the largest bags greatly predominating in number.

An arrangement is being made here for regular direct importations of flour from Baltimore.

The importers of American flour doing business in Cork are Byrne, Mahony & Co., R. H. Craig & Co., and William Bannister. The wholesale dealers in American flour doing business in Cork are Joseph Harty & Sons, Richard Clear & Co., Samuel Anglin & Sons, and William F. Ryan.

MONETARY AND SHIPPING FACILITIES.

The facilities for monetary exchange leave nothing to be desired.

No direct line of steamers or sailing vessels discharge freights at this port. The White Star, Cunard, Guion, and American (Inman) lines merely land and receive passengers and mail. These great lines, doing business between Liverpool and New York, Philadelphia, and Boston, touch at this port regularly, but not for cargo business.

TRADE OUTLOOK.

The only obstacle in the way of extending trade in American flour is that the trade is already very large, consequently there is no great room for its extension in this district.

LUCIEN J. WALKER,
Consul.

CORK, *February 3, 1894.*

GLASGOW.

STANDARD OF LIVING.

The standard of living is high in this district, and the people are ready to eat American flour—it is preferred to any other.

The city of Glasgow is now officially estimated to contain 623,000 inhabitants, while in Partick, Govan, and other municipalities and suburbs, which are really a part of Glasgow, there are some 200,000 people.

Wheat bread is extensively used by all classes and is a staple article of food. The consumption is enormous, and the opportunity for the use of American flour is being daily enlarged.

QUALITY OF FLOUR CONSUMED.

The quality of the flour used is spring and winter wheat patent flour from the United States and flour from local mills and from France and Hungary. Only about one-eighth of the imported flour now comes from the two countries last named.

IMPORTS OF FLOUR AND WHEAT.

The quantity of flour and wheat imported into this district was:

Year.	From the United States.		From other countries.	
	Wheat flour.	Wheat.	Wheat flour.	Wheat.
	*Sacks.**	*Quarters.*†	*Sacks.**	*Quarters.*†
1891	1,173,496	421,498	309,348	90,988
1892	1,461,547	617,784	148,538	19,911
1893	1,474,895	534,953	171,306	16,364

*280 pounds each. †480 pounds each.

EXCHANGE FACILITIES.

The almost invariable rule is for the American shipper to draw on his consignee at sixty days' sight against the documents forming the title to the consignment. This draft is generally negotiated by the shipper, and the consignee can only get the bill of lading and delivery of the goods on payment of the draft.

There is no trouble as to monetary exchange; the facilities are ample.

SHIPPING FACILITIES.

The facilities for shipment from the United States to Glasgow are good, but shipment under present conditions must probably be made in foreign vessels. During the last year but few American vessels have reported at any of the ports in this district, and these have all been sailing vessels loaded with spool wood and coming from Portland, Me.

There are several lines of vessels from Glasgow to the United States. Two of them, the Anchor and Allan lines, run transatlantic steamships regularly between Glasgow and New York, Boston, Philadelphia, Newport News, and occasionally Baltimore.

Some of these steamships leave New York and Glasgow every week. For the last year, especially during the last six months, owing to the financial depression, the supply of transportation has exceeded the demand. There will probably be no difficulty in the speedy shipment of all the flour to this port from the United States that can be sold here.

OBSTACLES TO TRADE.

The competition of the local millers, who have the wheat markets of the world at their command, as well as a considerable home supply, is the only serious obstacle in the way of an extension of trade in American flour. The apparent apathy of our flour dealers in the United States also hinders extension. Much can be done by a personal visit here, with samples, which can not be reached alone by correspondence.

I know of one miller from Adrian, Mich., who last summer personally visited Glasgow and other cities in the United Kingdom with samples of his flour, and he found no difficulty in placing his product, or in continuing the sale thereof.

TRADE OUTLOOK.

As will be seen from the figures heretofore given, the consumption of American flour is on the increase. The American millers already supply one-half or more of all the wheat flour used in this district, and it is the opinion of those engaged in the trade that in the future the importation of American flour will steadily increase.

I annex an excerpt from the Glasgow Daily Herald of December 27, 1893, which gives reliable information on the subject. The figures in the newspaper are for the cereal years ending August 31.

MILLING.

The characteristic, if such it can be called, so far as the milling trade is concerned, of the year 1893, may be summed up in the word disappointing. The tremendous drop in prices experienced during the preceding year gave place to a more sober and dignified method of progression, but still unfortunately in the same downward direction. A fall in price to the extent of 7*s.* per sack in flour and 12*s.* per quarter in wheat took place during 1892, whereas 1893 has had to content itself with a drop amounting only to 2*s.* 6*d.* in flour and about 3*s.* in wheat. Merchants, millers, and bakers have, as a rule, been holding very large stocks of both wheat and flour; and so long as this continues—so long, indeed, as everyone keeps prepared for a rise—there is small probability of the consummation so devoutly wished for taking place. Spasmodic attempts have, indeed, been made by the speculative element in America to raise the level of values, but with no very marked success. Millers here, finding it quite out of the question to respond to any extent, owing to the depressed price of flour, simply refrained from buying at the enhanced values. Stocks of wheat accumulated because of the absence of any shipping relief, and prices had perforce to resume their former depressed level. The very large import of foreign flour has again been the great stumbling block in the path of the home miller, and so long as the Yankee is actuated by the, to him, patriotic notion that the manufactured article alone should find its way to the ports of the Britisher this state of matters, given a fair crop in America, is likely to continue. Notwithstanding the glut of foreign flour, the home miller has kept fairly busy during the past year, mainly owing to his being able to put hard-wheat flours on the market at a more moderate price than his principal competitor. The same, unfortunately, can not be said with regard to winters. The chances are, however, that this state of matters may improve, and so a presently dormant branch of the millers' business become once more available. A feature of the last few weeks has been the free buying, by merchants and millers alike, of new-crop Russian wheats for present, January, February, and April-May shipment. Of very excellent quality, and having first-rate milling properties, this class of wheat has not been without its effect in checking any advance in the price of American varieties. With regard to imports, in 1892 we received 628,645 quarters of wheat; this year the quantity is likely to be somewhat less—about 585,000 quarters. Of flour, last year we imported 1,734,271 sacks of 280 pounds, while during 1893 the quantity is smaller, amounting to about 1,635,000. During 1892 49,349 quarters of wheat were reëxported from Glasgow; this year somewhere in the neighborhood of 56,000 quarters have been so disposed of. Last year 952,744 sacks of flour, home millers and foreign, left Glasgow; this year the quantity will be somewhat smaller, namely, 932,000 sacks. It is a matter of no small difficulty forecasting with any degree of accuracy the immediate future of the milling trade. As a general rule, the demand for home flour improves with the opening year; but any enhancement in value seems, with the present prospective abundant supplies, a very doubtful quantity indeed. Millers will without doubt do their utmost to keep mills running full time, and so give constant employment to their men. Should the fortune of war, however, be against them, the chances are they will, like Mark Tapley of pious memory, seek to be jolly under all circumstances, setting, as the good old saying hath it, a stout heart to a stey brae.

ALLEN B. MORSE,
Consul.

GLASGOW, *January 4, 1894.*

HULL.

EAST RIDING MILLER'

The probabilities of the immediate or eventual extension of markets for American wheat flour involve the examination and consideration of many local circumstances and statistics. From a careful review of facts and information of an absolutely trustworthy character, it may be accepted without question that the prospect of an increased import of wheat flour is assured so long as present conditions obtain or remain substantially unaltered.

In the first place, it is necessary to take a retrospective view of the flour industry in the extensive territorial area comprised within the consular district of Hull in order better to understand and appreciate the existing position of the import trade. Apart from Hull, the East Riding of the county of York is, and always has been, an essentially agricultural country, producing a large quantity of wheat grown on good lands and possessing excellent facilities for transit by rail, river, and canal. Flour mills abounded, and Hull and the contiguous district were equally noted for the number of mills. With the rapid growth of population, however, the windmills and mills worked by water courses became more picturesque than useful, and when the American and Hungarian inventions for manufacturing flour by the roller process came into vogue the old mills and old methods were unable to satisfy the demands of the population, either as to quality or quantity.

The pressure of economic and industrial needs forced the local millers to abandon means and premises which had become obsolete, and, in point of fact, unprofitable, with the result that new and, in every instance, very extensive mills, thoroughly appointed with the newest kinds of machinery, with large storage capacity, were erected, and they are now in full working order. As a natural consequence, there is a vast increase in local production of flour, with an appreciable reduction in price, compared with the cost to the consumer under the old order of things. This is a fact which must not be lost sight of in discussing the question of American wheat flour. The introduction of improved methods of milling, together with commensurate buildings for storage, has undoubtedly had considerable effect upon the imports of flour, but to what extent is a matter of pure conjecture. On this, as well as on other points, it may be mentioned that the millers maintain a surprising amount of reserve. Assuming that American flour, or rather its importation, has suffered to some extent by the enterprise of local manufacturers, the diminution, if such it may be termed, is fully countervailed by the use of wheat from the United States. In the Hull mills and the mills of the East Riding, much American wheat is made into flour, but the quantity used is not ascertainable, owing to the indisposition on the part of the millers to disclose any material facts relative to their trade.

As illustrating the rapid development of the flour-milling industry in Hull and the surrounding country, it is sufficient to mention the fact that large quantities of flour are sent into various parts of Lancashire and Yorkshire. No data on this aspect of the question is procurable, but the fact is of itself suggestive. How far the millers would be able to supply a portion of the needs of Lancashire and the distant Yorkshire towns, were the import from America less, is a subject of speculation and not of certainty. It tends to show, however, that with the increased imports of foreign wheat and improved mechanical arrangements the competitive and aggressive power of local manufacturers has become more formidable. The opening of the Manchester Ship Canal and the consequent rearrangement of railway policies and tariffs may or may not increase the production of flour in this connection.

STANDARD OF LIVING.

Another point which must not be overlooked in relation to the subject under consideration is that in eastern Yorkshire, as already indicated, the population is chiefly rural. With the exception of Hull, all the towns within this division of Yorkshire are representative of the agricultural interest. There is an absence of manufacturing industries and of centers of population such as characterize the West Riding of Yorkshire. Nor can the standard of living be regarded as equal to that of the industrial population of the West Riding, where both men and women are well paid for their work and can consequently indulge themselves in a greater variety of food. Still, the population in the East Riding can not be said to subsist either on an insufficient or low standard of diet. Bread, of course, is the staple article of diet, and fresh meats, fish, and other foods are certainly within their average purchasing means.

Apparently there is no difficulty on the part of retailers of flour in disposing of American flour, and inquiry proves that the quality and nutritive properties are perfectly satisfactory.

QUALITY OF FLOUR CONSUMED.

A large importer of American produce carrying on business in Hull states that the quality of flour most used is straights and patents; but it may be said of American flour, as of English, that the average consumer varies in his or her preference. Incidentally, and in no inconsiderable degree having connection with the use of American flour, it is interesting to note the fact that in Hull there are some very large bakeries which serve a vast number of households every day with bread. The consumption of bakers' bread is constantly increasing, and this is a circumstance worthy of observation, in that it largely militates against forming an accurate judgment as to what is the popular opinion on the relative merits of English, American, Austrian, German, or other flours. In eating bread from the steam bakeries the people are incapable of distinguishing whether it is made from English or other flour, and therefore do not acquire any particular preference.

IMPORTS OF WHEAT AND FLOUR.

The consumption of imported flour by way of Hull continues to show a decided improvement in respect of quantity, notwithstanding the increased ratio of production in the home markets. From whatever source they are obtained, the statistics, although manifesting some remarkable fluctuations and involving some slight variations in the totals, establish the vitality of the import trade and encourage the most hopeful anticipations of an increased consumption, with the more than possible opening out of new fields of enterprise. It is a peculiarly strange fact that the representative commercial organizations, while they distinguish with particularity the different countries sending wheat to England, do not apparently think it of sufficient importance to specify the quantities of flour received from the several exporting countries. The result of this inappreciation of the value and importance of discriminating in respect of the imports has necessitated a laborious search and study of the diurnal records of the custom-house, embracing a number of years. The imports are given in hundredweights and represent the total consignments of wheat flour from the different countries named for the calendar years.

Wheat flour imports at Hull.

From—	1891.	1892.	1893.
	Cwts.	*Cwts.*	*Cwts.*
United States	90,134	139,900	136,911
Austria-Hungary	30,196	23,563	28,071
Germany	23,963	11,377	31,877
France	5,847	3,194	6,358
Italy	5,976	6,102	13,020
India	....	5,000	....
Russia	3,423	3,391	....

According to figures in the possession of the Hull Chamber of Commerce, the following are the total entries of imported wheat flour since 1883; but, as already stated, no mention is made of the countries exporting the same:

Year.	Quantity.	Year.	Quantity.
	Cwts.		*Cwts.*
1883	295,520	1889	78,114
1884	202,559	1890	101,877
1885	141,606	1891	*157,343
1886	125,976	1892	*185,090
1887	100,172	1893	223,569
1888	184,827		

* The imports by countries for the years 1891 and 1892 in the preceding statement exceed these totals.

Thus it would appear that the imports of flour are the highest in the first and last years just mentioned. The American flour maintains an undoubted supremacy in the official returns, and everything points to a still further development of the trade, as the area of wheat cultivation in the United Kingdom is constantly being restricted.

Concerning the importation of wheat at Hull, the figures for the last decade will serve to show the huge development which has taken place. The following are the total quantities imported for the years 1884–'93:

Year.	Quantity.	Year.	Quantity.
	Quarters.		*Quarters.*
1884	944,275	1889	2,112,699
1885	1,288,552	1890	2,034,538
1886	1,353,762	1891	2,420,084
1887	1,406,410	1892	2,317,389
1888	1,985,744	1893	2,346,184

For the years ending December 31, 1891, 1892, and 1893, the imports of wheat were from the following countries:

Countries.	1891.	1892.	1893.
United States:	*Quarters.*	*Quarters.*	*Quarters.*
East coast	339,844	516,420	641,855
West coast	415,716	474,248	708,067
Total	755,560	990,668	1,349,922
Australasia	13,589	....	27,427
India	1,030,340	812,168	503,444
Chile	....	11,308	55,037
Egypt	69,877	34,604	2,696
Germany	10,055	62,425	1,790
Russia	399,796	124,807	392,197
Roumania	122,026	153,503	8,029
Turkey	14,454	9,261	....
All other	4,387	18,585	5,642
Grand total	2,420,084	2,217,329	2,346,184

EXCHANGE AND SHIPPING FACILITIES.

The whole of the American flour trade from New York is carried by the Wilson line of steamers, which are cargo boats simply, although they occasionally carry passengers. This is a fact which precludes the idea of a much lower rate of freight. In all other respects there is every reason to be satisfied with the conditions under which the trade is conducted. The shipping facilities are all that can be desired, and there is ample warehouse and shed accommodation for cargoes of flour and wheat. The Messrs. Wilson quote through rates from America, and a considerable quantity of the flour which they carry is destined for Norway and Sweden and other places on the Continent. The shipping facilities being in every respect favorable and the dock accommodations excellent, the outlook for the trade is eminently satisfactory. The steamers of the Wilson line run regularly and are well adapted to the Atlantic trade.

Moreover, the facilities for monetary exchange are described by importers of American produce as excellent, and no alteration is suggested as an improvement upon the existing system of exchange, which has been found to work perfectly satisfactory.

OBSTACLES TO TRADE.

There are one or two things which may retard the growth of the American trade in so far as regards the northeast coast of England. The freight is appreciably higher than it is to the west coast. This is the natural result of the difference in geographical position, but it is none the less an important factor in the import of flour or any other goods from American ports. A single quotation from a freight circular will suffice to illustrate how, in this connection, the east coast is handicapped. Flour in sacks is quoted at 11*s.* 3*d.* and 12*s.* 6*d.* per ton for Liverpool, 12*s.* 6*d.* for London, 15*s.* for Southampton, 12*s.* 6*d.* for Glasgow, 13*s.* 9*d.* for Bristol, 12*s.* 6*d.* for Leith, 15*s.* for Hull, and 15*s.* for Newcastle.

The only possible obstacles to an indefinite extension of trade in American flour are the increased local output and the higher rate of freight as compared with the west coast. But, as indicating the unlikelihood of local and shipping conditions operating to the prejudice of American flour, there is the fact that the shipments from New York show an increased average and volume.

BYRON G. DANIELS,
Consul.

HULL, *January 27, 1894.*

NOTTINGHAM.

The standard of living in Nottingham is higher than in most manufacturing districts in England, and about the same as in towns of like population (250,000) in the United States. The people are ready to eat American flour.

The quality of flour most used is of the better grades.

This district is wholly inland and no statistics as to imports of wheat and flour apply thereto.

The facilities for monetary exchange and shipping are ample.

The only obstacle in the way of the extension of trade in American flour is the price, which is some 2½ or 3 per cent higher than Hungarian and other flours.

The outlook for increased trade in American flour is favorable, provided its cost is not in excess of that of other foreign flours. The consumption of American wheat and flour in the United Kingdom is dependent almost wholly upon the price as compared with that furnished by other countries.

The following is a statement from the London Times, of January 22, 1894, showing the annual average prices of English wheat per "imperial quarter" (480 pounds) for each of the last forty-two years:

THE PRICE OF ENGLISH WHEAT.

To what depth the trade in native wheat has fallen is well illustrated in the subjoined table, which records the average price per imperial quarter of English wheat for each of the last forty-two years, as well as the highest and the lowest weekly average prices per quarter in each year, while the last column shows for each year the difference between the extreme prices. The average price of 26*s.* 4*d.* for last year is 3*s.* 5*d.* below that of 1889, which is the lowest average previously recorded. Moreover, if we except the year 1892, the highest weekly average of 1893 falls below the lowest weekly average of any previous year. The lowest weekly average of 24*s.* 8*d.* in 1893 is absolutely the lowest average price ever recorded. How uneventful was the trade of 1893 is shown by the circumstance that the extreme fluctuation in the weekly average prices did not exceed 3*s.* 2*d.* per quarter, so that the dull year of 1889 now loses its place as the lowest hitherto on the list, and it is exceedingly noteworthy that the highest weekly average of 1893 did not reach the lowest weekly average price of 1889. Farmers whose memory carries them back to the time when anything less than 40*s.* a quarter for English wheat was undreamt of will scan the figures with saddened eyes, for they will see that during the whole of the last decade the 40*s.* limit has only once been passed, and that was for but a brief period at about the month of May, 1891. The table shows that the ten years which closed with 1893 might fairly be called the "thirty-shillings decade," for the mean average of the whole period is less than 32*s.* Who can say that we have not now embarked upon a "twenty-shillings decade?"

Annual average prices per imperial quarter of English wheat, 1852–1893.

Year.	Calculated annual average.		Highest weekly average.		Lowest weekly average.		Range per quarter.	
	s.	*d.*	*s.*	*d.*	*s.*	*d.*	*s.*	*d.*
1852	40	9	43	3	38	4	4	11
1853	53	3	72	5	44	2	28	3
1854	72	5	80	10	56	7	24	3
1855	74	8	80	10	67	8	13	2
1856	69	2	76	6	60	3	16	3
1857	56	4	63	4	48	7	14	9
1858	44	2	48	0	40	7	7	5
1859	43	9	51	3	40	2	11	1
1860	53	3	60	4	43	10	16	6
1861	55	4	60	11	50	7	10	4
1862	55	5	61	4	46	4	15	0
1863	44	9	47	4	40	0	7	4
1864	40	2	43	1	38	1	5	0
1865	41	10	46	7	38	3	8	4
1866	49	11	61	7	44	5	17	2
1867	64	5	70	5	53	3	11	2
1868	63	9	74	7	49	5	25	2
1869	48	2	54	2	43	5	10	9
1870	46	11	54	11	40	7	14	4
1871	56	8	60	0	52	6	7	6
1872	57	0	60	3	53	11	6	4
1873	58	8	64	7	54	7	10	0
1874	55	8	63	9	43	5	20	4
1875	45	2	53	10	40	11	12	11
1876	46	2	50	8	42	8	8	0
1877	56	9	68	9	50	1	18	8
1878	46	5	52	4	39	0	13	4
1879	43	10	50	5	37	7	12	10
1880	44	4	48	4	39	5	8	11
1881	45	4	52	2	40	9	11	5
1882	45	1	51	3	39	2	12	1
1883	41	7	43	10	39	0	4	10
1884	35	8	39	0	30	5	8	7
1885	32	10	38	1	30	2	7	11
1886	31	0	35	0	29	0	6	0
1887	32	6	36	4	28	5	7	11
1888	31	10	38	1	30	1	8	0
1889	29	9	31	2	27	11	3	3
1890	31	11	36	6	29	8	6	10
1891	37	0	41	8	32	3	9	5
1892	30	3	36	4	25	8	10	8
1893	26	4	27	10	24	8	3	2

The years of extreme quotations in the foregoing table are noteworthy. The highest annual average price was 74*s.* 8*d.* per quarter in 1855 and the lowest was 26*s.* 4*d.* in 1893. Of the highest weekly averages the maximum was 80*s.* 10*d.* in the Crimean war years of 1854 and 1855, and the minimum was 27*s.* 10*d.* last year. Of the lowest weekly averages, the maximum was 67*s.* 8*d.* in 1855, and the minimum was 24*s.* 8*d.* in 1893. The year of widest fluctuations was 1853, when the difference between the highest and lowest weekly averages was as much as 28*s.* 3*d.*, which represents more than the highest weekly average price of native wheat in 1893. The minimum range is last year's 3*s.* 2*d.*

I also attach a statement showing the respective qualities of the different varieties of wheat consumed in the United Kingdom and their prices:

Comparative qualities of thirty five varieties of wheat used by British and Irish millers.

Description.	Strength.	Color.	Flavor.	Moisture.	Per quarter of 480 pounds.
English:					
White	1	10	10	10	27*s.* in Nottingham.
Red	2	9	10	10	25*s* 6*d.* in Nottingham.
New Zealand	2	9	9	9	Not known.
Canadian White	3	8	8	8	Do.
Oregon	1	10	8	7	Do.
Walla Walla	1	8	7	7	25*s.* in Liverpool.
Californian	3	8½	6	6	26*s.* 6*d.* in Hull.
Australian	4	9	9	6	27*s.* in London.
Chilean	3	8	7	7	Not known.
Red winter	5	8	8	8	Do.
Spring:					
No. 1	6	7	7	7	25*s.* 9*d.* in London.
No. 2	6	6	7	7	24*s.* 9*d.* in London.
Dantzic:					
White	4	8	8	8	Not known.
Red	5	7	8	8	Do.
Königsberg	5	7	8	8	Do.
Polish	3	6	7	8	Do.
Danubian	3	5	5	7	23*s.* 6*d.* in Hull.
Azura	5	6	8	8	23*s.* 6*d.* and 25*s.* 6*d.* in Hull.
Ghirka	6	6	7	7	Do.
Persian	5	5	5	7	Not known.
River Plate	4	7	6	7	23*s.* 9*d.* in Hull
Taganrog	7	5	6	6	Not known.
Saxonska	9	7	7	7	Do.
Kubanka	10	7	7	7	Do.
Manitoba	9	7	8	7	27*s.* in Hull.
Duluth	8	7	7	7	
Bombay:					
White	2	9	5	5	27*s.* in London.
Soft Red	4	6	5	5	26*s.* in London.
Delhi	2	8	5	5	Not known.
Kurrachee:					
White	3	6	5	5	22*s.* 6*d.* and 24*s.* 6*d.* in Hull.
Red	4	5	5	5	21*s.* 6*d.* and 23*s.* 6*d.* in Hull.
Calcutta:					
No. 1	2	8	5	5	26*s.* in London.
No. 2	4	6	5	4	24*s.* 1*d.* in London.
Red	4	4	4	4	23*s.* in London.
Egyptian	0½	2	2	2	Not known.

NOTE.—The figure "10" represents the standard of perfection.

A. D. DICKINSON,
Consul.

NOTTINGHAM, *January 31, 1894.*
No. 162——13.

SHEFFIELD.

STANDARD OF LIVING.

The standard of living in this district is moderate, but compares favorably with that of any other portion of England. The population is chiefly of the working and industrial classes, who eat three meals per day—breakfast, dinner, and tea. Bread, beef, mutton, pork, fish, vegetables, veal, coffee, butter, bacon, cheese, and beer are the principal articles of food and drink. The wealthier classes indulge in a more varied fare—game, ham, eggs, fruits, pastry, sweets, wines, etc.

The people are ready to eat American wheat flour provided they can get good quality at a low price. The flour mostly used here is known as the "XXX" standard, which dealers purchase from local millers, who supply the trade at about 23 to 24 cents per stone (14 pounds).

IMPORTS OF FLOUR AND WHEAT.

As far as can be ascertained, no American wheat flour comes into the district. As competition among the millers is very keen, the prospects for others doing business in wheat flour are poor.

Mr. Samuel Smith, Victoria Corn Mills, Sheffield, furnishes the following estimates of wheat imported into this district:

Year ending June 30—	From the United States.	From other countries.
	Bushels.	*Bushels.*
1891	50,000	1,900,000
1892	140,000	2,000,000
1893	440,000	2,200,000

EXCHANGE AND SHIPPING FACILITIES.

No difficulties exist in the way of monetary exchange. Besides the banks which negotiate through London, there are two local houses which exchange moderate amounts at sight.

The facilities for shipping from the United States are good, viz, by vessel to Liverpool, Hull, or London, and then by rail. Goods are shipped cheaply via Hull and the Goole Canal, though this route is longer. Goods can be shipped by vessel to Manchester direct via the ship canal, which has recently been opened for traffic, and then by rail.

BEN. R. BEDLE,
Consul.

SHEFFIELD, *January 19, 1894.*

TUNSTALL.

STANDARD OF LIVING.

The district of Tunstall proper contains a population of about 250,000. The chief industries are pottery and coal and iron mining. The pottery industry so far excels all others that the district is commonly known as the "Potteries." There are no statistics that give any reliable information of those engaged in the various pursuits, but from all sources obtainable the number engaged in each industry is approximately as follows:

Colliers and ground men	18,000
Iron workers	2,000
Potters (men, women, and children)	40,000
All other trades	10,000

The standard of living fluctuates with the ebb and flow of business, and the general average is raised or depressed more by the prosperity or depression of the pottery trade than by all other causes combined.

Weighed in this balance the standard of living, at the present time, is lower than for many previous years; in fact, a fair statement of the general standard of living can not be made from the present condition of the working classes.

During times of fair or brisk trade the general standard of living in this district will be equal to that of any other manufacturing district in England.

QUALITY OF FLOUR CONSUMED.

The great bulk of the flour used in this district bears the brands of "Patent 000," "Superfine 00," and "Long Fine 0," of which the greater quantity used is the middle quality.

The people are ready to eat American flour whenever the quality and price give better bargains than the product of any other country.

IMPORTS OF FLOUR AND WHEAT.

It is impossible to give even an approximate answer to these questions, as no American flour is imported directly into this district, and the small quantity used is purchased in Liverpool. I have been unable to find, after the most careful inquiries, any American flour for sale in any of the retail shops of this district. Nearly all the flour used is made in the various mills here from home-grown and imported wheat. Individual families use but little flour, as bread and nearly all pastry is purchased at the bakeries. I can not ascertain from the bakers what proportion of American flour they use.

The wheat made into flour by the two leading mills in this district during the period named is mixed in the following proportions:

Mill No. 1.—United States, one-third; Russian, one-third; Indian, one-third.

Mill No. 2.—Canadian, one-sixth; Northern, one-sixth; Russian, one-sixth; Indian, one-sixth; English, one-sixth; American (Kansas), one-sixth.

Previous to the years named in the Department circular a much larger proportion of American wheat was used in mill No. 2, sometimes reaching as high as three-fourths of the entire quantity, while in mill No. 1 American wheat was almost entirely used in 1891 and 1892.

EXCHANGE FACILITIES.

The facilities for monetary exchange are the Manchester and Liverpool District Banking Company (limited), the Birmingham District and Counties Banking Company (limited), the National Provincial Banking Company (limited), and Lloyd's Banking Association.

SHIPPING FACILITIES.

This district is reached by the London and Northwestern Railway Company and the North Stafford Railway Company from Liverpool, and also by canal from the same port.

OBSTACLES TO TRADE.

The main obstacle is the conservatism of the bakers, who furnish nearly all the bread of the district—the fear of change and the desire (if a lower price does not offer too great an inducement) to follow the course pursued for many years. Bakers have a steady trade, and any change in the line of experiment with new brands of flour is avoided.

TRADE OUTLOOK.

No steps have been taken to directly introduce American flour into the district. Flour made here will continue to be used until such steps are taken. The millers will buy American wheat whenever it is to their advantage to do so; but the consumers, without solicitation, will not purchase American flour. The old channels of buying this product will not be broken up without an effort on the part of the American seller. I see no reason, however, why a market can not be opened here for the American product if the project be sufficiently pushed. "Superfine 00" retails for 36 cents per 14 pounds. Many English people in this district who have resided in the United States for a time claim that American flour, grade for grade, is better than the English product. If such be the case, a market once gained can be held.

WENDELL C. WARNER,
Consul.

TUNSTALL, *January 15, 1894.*

WATERFORD.

Wheat flour is largely used in this district by all classes. Bakers supply nine-tenths of the bread consumed. American flour is largely imported, principally via Liverpool.

It is very difficult to obtain a correct return of the quantity, there being no statistical record kept.

The quantities of wheat imported during the years 1891, 1892, and 1893 coming direct to Waterford were small and did not average more than one cargo in each year, calculating about 2,500 tons for each cargo. At the same time, however, a large quantity was imported, principally via Liverpool. Of wheat imports, there were from Australasia about 4,000 tons per year for the years 1891, 1892, and 1893. These were direct imports; also, via Liverpool there were sundry large parcels. From California there were for the years 1891, 1892, and 1893 one cargo each year, averaging 2,000 tons each. No wheat is imported from other countries.

Steamers and sailers are easily obtained for the transport of grain to any safe port in Ireland.

I am not aware of any obstacles in the way of the extension of trade in American flour.

In my opinion, an extensive business can always be done; all depends, however, on prices.

WILLIAM H. FARRELL,
Consular Agent.

WATERFORD, *January 9, 1894.*

GIBRALTAR.

STANDARD OF LIVING.

The standard of living in Gibraltar may be considered as a tolerably high one, and can be favorably compared with the highest ruling throughout the Mediterranean.

For the past century American flour has always been a favorite article of consumption in Gibraltar.

QUALITY OF FLOUR CONSUMED.

Both superior and low grade flour is imported, but the bulk consists of low grade.

IMPORTS OF FLOUR AND WHEAT.

As no official statistics are kept in Gibraltar with regard to the importation or exportation of flour or wheat, I have in consequence been under the necessity of having recourse to that part of the commercial community who deal in flour and cereals to compile the following data to enable me to offer as accurate a reply as possible to several of the queries set forth in the circular.

The direct imports of flour during the years ending June 30, 1891, 1892, and 1893, were as follows, in sacks of 280 pounds each:

From—	1891.	1892.	1893.
	Sacks.	*Sacks.*	*Sacks.*
United States	3,442	17.340	42,835
Great Britain	25,262	16,910	18,585
France	6,820	3,444	2,750
Algeria	84		40
Total	35,608	37,694	64,210

A large portion of the flour thus imported from Great Britain was to meet Government contracts for supplying the garrison of Gibraltar.

No American wheat was imported during the years ending the 30th of June, 1891 and 1892, but 6,000 bags of 224 pounds each were imported in 1893.

Wheat imported from countries other than the United States during the years under consideration, in bags of 224 pounds each, was as follows:

From—	1891.	1892.	1893.
	Bags.	*Bags.*	*Bags.*
India	11,430	5,000	67,200
France	9,124		
Great Britain	8 0		7,526
Total	21,354	5,000	74.726

The wheat credited to England and France in this table was Indian wheat.

EXCHANGE FACILITIES.

The usual facilities are afforded here for monetary exchange, similar to those existing in other European markets, which consist in the buying and selling of exchange on the leading cities of Europe, but principally on London, and often on Paris. Besides, the military pay department is constantly in the market, offering short-sight drafts on the British treasury, London, in exchange for Spanish and British money.

Bankers and commercial firms established in Gibraltar also buy and sell exchange, and are often disposed to advance on merchandise, ordered from abroad by speculators and others engaged in the importation of cereals into the neighboring Spanish towns and seaports, through the medium of a fair commission.

SHIPPING FACILITIES.

Frequent and convenient facilities are also afforded for importing to this port from New York flour and wheat by steamships belonging to the North German Lloyds, the British Anchor, the Florio-Rubattino, and Phelps steam lines. They have no fixed days of departure, but furnish the means for constantly supplying this market with every description of American produce required.

These steamships generally accept cargo on freight at reasonable rates.

OBSTACLES TO TRADE.

No obstacles exist in the way of increasing the trade in American flour beyond the fluctuations which usually occur in general commerce, through glutted markets, limited demand, and depressed condition of trade; also, on the advance or decline in the rates of exchange, incidents which invariably transpire throughout the commercial world.

A large quantity of the flour imported into Gibraltar is sold for the neighboring Spanish district, but, as the stocks of American flour usually kept on hand in this market generally exceed the demands for it, only an increased export demand for supplying the neighboring Spanish towns and seaports could, in my opinion, be the means of extending the business for American flour at this port; but as this could only be attained by a considerable decrease on the present ruling duties levied by Spain on all foreign importations of flour, I do not see any likelihood for such a result.

DUTIES.

Gibraltar being a free port no duties of any description are levied on flour or wheat imported.

HORATIO J. SPRAGUE,
Consul.

GIBRALTAR, *January 12, 1894.*

Title-page VI, 990

Vol. XLIV. No. 163.

CONSULAR REPORTS.

APRIL, 1894.

COMMERCE, MANUFACTURES, ETC.

[FOR TABLE OF CONTENTS, SEE FIRST PAGE.]

DEPARTMENT OF STATE * UNITED STATES OF AMERICA *

WASHINGTON:
GOVERNMENT PRINTING OFFICE.
1894.

PUBLICATIONS OF THE BUREAU OF STATISTICS.

In addition to the monthly CONSULAR REPORTS, the following works have been published by the Bureau of Statistics:

"Labor in Europe," 1878, one volume; "Labor in Foreign Countries," 1884, three volumes; "Commerce of the World and the Share of the United States Therein," 1879; "Commerce of the World and the Share of the United States Therein," 1880–'81; "Declared Exports for the United States, First and Second Quarters, 1883;" "Declared Exports for the United States, Third and Fourth Quarters, 1883." "Cholera in Europe in 1884," 1885; "Trade Guilds of Europe," 1885; "The Licorice Plant," 1885; "Forestry in Europe," 1887; "Emigration and Immigration," 1885–'86 (a portion of this work was published as CONSULAR REPORTS No. 76, for the month of April, 1887); "Rice Pounding in Europe," 1887; "Sugar of Milk," 1887; "Wool Scouring in Belgium," 1887. "Cattle and Dairy Farming in Foreign Countries," 1888 (issued first in one volume, afterwards in two volumes); "Technical Education in Europe," 1888; "Tariffs of Central America and the British West Indies," 1890.

The editions of all these publications except the one last mentioned are exhausted.

Information relating to special subjects—secured by circulars addressed to consular officers—increased to such an extent that at length in 1890 the Department decided to publish such reports in separate form to be entitled "Special Consular Reports." There are now nine volumes of these "Special Consular Reports:"

Vol. 1 (1890).—"Cotton Textiles in Foreign Countries," "Files in Spanish America," "Carpet Manufacture in Foreign Countries," "Malt and Beer in Spanish America," and "Fruit Culture in Foreign Countries."

Vol. 2 (1891).—"Refrigerators and Food Preservation in Foreign Countries," "European Emigration," "Olive Culture in the Alpes Maritimes," and "Beet Sugar Industry and Flax Cultivation in Foreign Countries."

Vol. 3 (1891).—"Streets and Highways in Foreign Countries."

Vol. 4 (1892).—"Port Regulations in Foreign Countries."

Vol. 5 (1892).—"Canals and Irrigation in Foreign Countries."

Vol. 6 (1892).—"Coal and Coal Consumption in Spanish America," "Gas in Foreign Countries," and "India Rubber."

Vol. 7 (1892).—"The Stave Trade in Foreign Countries," and "Tariffs of Foreign Countries."

Vol. 8 (1892).—"Fire and Building Regulations in Foreign Countries."

Vol. 9 (1892 and 1893).—"Australian Sheep and Wool," and "Vagrancy and Public Charities in Foreign Countries."

Vol. 10 (1894).—"Lead and Zinc Mining in Foreign Countries."

Of these Special Reports "Cotton Textiles in Foreign Countries," "Files in Spanish-America," and "Malt and Beer in Spanish America" are exhausted.

The Bureau of Statistics of the Department of State will be grateful for the return of any monthly or special numbers of Consular Reports.

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CONSULAR REPORTS.

COMMERCE, MANUFACTURES, ETC.

VOL. XLIV. APRIL, 1894. No. 163.

LAND TAXATION IN NEW ZEALAND.

In the matter of taxation laws New Zealand excels as compared with the other Australasian colonies, and perhaps with many older countries. Here, at least, legislation has been introduced that has been most violently assailed as being experimental, socialistic, confiscatory, and impracticable. But, regardless of this terrible arraignment, the taxation laws have been fully and successfully established and given practical effect, even while other countries were theorizing on the same principles.

In a very short time the incidence of taxation has been almost entirely changed—always a most hazardous undertaking, because of its tendency to disturb existing values and disarrange business enterprise. Here reforms have been introduced which revolutionized the old system without affecting, at least to any appreciable extent, existing interests. It is true there were many who, through the public press, in the halls of legislation, and on the highways and byways of the country, proclaimed their belief that the changes in the incidence of taxation would surely involve the country in financial ruin; but subsequent events conclusively demonstrated how ill founded were their apprehensions. The most determined opposition to the "new taxation" came from the moneyed institutions, loan companies, and the owners of vast landed estates. It was found, however, as soon as the new system became law and was thoroughly established and fully understood, that, instead of involving the colony in ruin, it had exactly the contrary effect. The credit of the colony in London (which is, of course, the center of financial operations so far as the colonies are concerned) increased to an unprecedented degree. New Zealand's credit is better to-day on the London money market than is that of any other colony of Australasia. This pleasant position is not attributable to the new system of taxation alone, although it may be fairly said to have materially assisted in establishing confidence in the country. The nonborrowing policy of the government and the general recuperative powers of the colony assisted in restoring faith in the country.

The aim of the new government has been to relieve the "weaklings" as much as possible from the burden of taxation and to place it upon the shoulders of those who were better able to bear it.

Up to 1891 a land and personal-property tax was imposed; but during the years of depression the colonists generally complained of the personal-property tax as being a grievous burden. One of the first acts of the new government was to abolish the "property tax" and substitute an "improvement tax." All improvements on land up to $15,000 were exempt, but all improvements above that amount were taxed.

The deduction of mortgages and of improvements up to a value of $15,000 renders very many owners exempt from land tax, the total number of land-tax payers in 1891 being 12,557 out of a total of 91,501 owners of land in the colony. It will be borne in mind that there is an exemption of $2,500, so that no man pays any taxes for state purposes until his property is worth over the above amount. The special exemption just referred to reduces the number of taxpayers. An owner whose land and mortgages, after the deduction of mortgages owing by him and of improvements up to the value of $15,000, do not exceed $7,500 is allowed a deduction by way of exemption of $2,500 (already mentioned), and this amount gradually diminishes until it disappears altogether when an owner's assessed value, less reductions, reaches $12,500.

In addition to the ordinary land tax, a graduated tax is levied, and for this all improvements are deducted; but an owner is not allowed to make any deductions for mortgages owing by him, and he has not to include in his return any mortgages owing to him. This tax is not imposed on any owner the value of whose land, less the improvements thereon, does not exceed $25,000, and the lowest rate imposed is one-eighth of a penny in the pound. The rate gradually rises until it reaches 2*d.* in the pound on the improved value of lands up to $1,050,000 or more.

ABSENTEE TAX.

There is a provision for levying 20 per cent additional over and above the ordinary and graduated tax in the case of owners who have been absent from or resident out of the colony for a period of three years or over prior to the passing of the yearly tax act. This absentee tax is considered a just one, for the reason that there are many large landowners living in England or elsewhere drawing large incomes from their possessions in the colony. These men contribute nothing toward promoting the welfare of the country; in fact, they are in many instances a serious drawback, in consequence of their holding large areas of land for speculative purposes, while those owning land adjoining theirs have been improving their property and paying taxes on their improvements. The absentees are taxed only on the unimproved value of their lands; but when it is offered for sale the price is materially enhanced, owing to the improvements made on neighboring lands. It is therefore in some degree to compensate the country for the loss thus sustained that 20 per cent additional has been imposed upon those owning estates in the colony, but who reside outside of it. This special tax only applies when the absolute owner is a nonresident, but if a partner of the absentee is a resident this additional tax is not imposed.

METHOD OF ASSESSMENT.

Under the existing law the value of land and improvements thereon is ascertained by an assessment made by assessors, who value the whole of the lands in the colony, whether occupied or unoccupied, whether belonging to companies or persons or local bodies, to natives or to the Crown.

It is not intended in future to have a triennial valuation of land, as has been the custom hitherto. It is now proposed that at the next session of Parliament a measure abolishing the triennial valuations of land under the direction of the commissioner of taxes be introduced and a system provided for having a readjustment of values when deemed necessary; but, as the value of land less improvements thereon is not subject to such frequent variations as the value plus improvements, it is not expected that such adjustments will be frequent. It is the intention of the tax department to engage skilled land-valuers in the several land districts—men who are familiar with their respective districts and who are experts in determining the value of lands. In order to indicate the extent of the work imposed in making a general triennial valuation, it will be sufficient to state that in making the assessment for 1891 there were two hundred and thirty land assessors employed. The total cost of the assessment, without including the salaries of the permanent officers, was over $165,000. Heretofore the government made the assessment for local bodies, but now it is proposed to place the cost of valuation on the shoulders of the county councils and road boards, thereby relieving, to a large extent, the general government of this burden.

After the assessors have completed their work, owners make returns of their lands to the tax department, and they have ample opportunities given them to object to the department's values; and any objections which are not allowed by the commissioner are referred to a board of review sitting in open court, who hear evidence and decide the value. The reviewers are chosen from residents in the district in which the lands are situated, and their decision is final and can not be appealed from. If, after the sitting of a board of review, an owner should not be satisfied with the value at which a property was assessed, he can call on the commissioner of taxes either to reduce the assessed value of the property to the sum at which he returned it or to purchase the property at the sum so returned. In other words, if the government will not reduce the value of his property to the figures he handed in as being its true value, the law gives him the privilege of asking the government to take the land at the value he placed upon it, and the government must accept one or the other alternative. But there is another provision which enables the commissioner to call upon an owner to agree to what the commissioner may consider the actual value of a property, and, should the owner refuse or not so agree, the commissioner may, with the approval of the governor in council, purchase the property at the value entered in the owner's return, with 10 per cent added thereto.

INCOME TAX.

There are a number of incomes exempt from the operation of this tax. Land and mortgages are reached by the land tax. All incomes from mortgages and rents and from the use or produce of land derived by the owner or occupier are exempt from this income tax. This, of course, materially reduces the number of income-tax payers, and, as all companies pay on their incomes, shareholders do not include in their returns of income dividends received by them. There is an income exemption of £300 ($1,500) allowed to each person, and this is deducted from all taxable incomes. Consequently the number of taxpayers and the revenue from the tax are both very greatly lessened by this exemption. It has been found that those who have a net income of $1,500, when all incomes derived from mortgages and rents and from the use or produce of land derived by the owner or occupier are omitted, bear a very small proportion to the total of those earning incomes. In comparing the New Zealand income tax with any other system it will be necessary, so far as results are concerned, to remember the large number of incomes that are not subject to it. The year ending March 31, 1893, was the first for which an income tax was collected, and the immense amount of labor involved in making the assessment, owing to the changes that have taken place in the system of taxation, rendered the result less satisfactory, perhaps, than it otherwise would have been if the officers of the department had more time and people were more familiar with the manner of making up their income-tax returns.

This tax, though generally conceded to be a just tax, is regarded with considerable aversion, owing to its inquisitorial character. It is not reasonable to presume the average colonial is any exception to the general rule of men who have to pay objectionable taxes—and nearly all taxes are objectionable. In filling in their income returns the commissioner of taxes says his efforts in scrutinizing these returns has resulted in many additions being made which amply repaid a careful scrutiny. It is only fair to suppose that such cases are always found wherever there is an income tax.

Any person objecting to his income-tax assessment may have his complaint heard before a competent court sitting as a board of review, and in all such hearings the proceedings are wholly private. The nature of the evidence is not permitted to transpire under penalty. This is done out of a sense of delicacy for the feelings of the objector, it being deemed undesirable to unnecessarily expose the nature of his private affairs to the public, as it would serve no interest except to satisfy the morbid curiosity of the overinquisitive.

GRADUATED LAND TAX.

There is what is known as a graduated land tax, in addition to the ordinary tax of the same kind, on land values over £5,000 ($25,000 in round figures). The object of imposing this additional tax is to compel those possessed of large estates and who are holding them for speculative purposes to either subdivide or offer such lands for bona fide settlement.

Under the circumstances, the justice and wisdom of this act is quite apparent when it is remembered that 1,766 owners hold from 1,000 to 10,000 acres each, 232 owners hold from 10,000 to 50,000 acres each, and 30 owners hold over 50,000 acres each.

The improved value of land held by fourteen landowners amounts to $27,690,245, while six owners hold land the improved value of which is $12,813,900. The total value of unimproved land held in large areas—say from 5,000 acres upwards—in 1892 amounted to the vast sum of $272,360,875. Thirty-two companies, such as banks, land and loan companies, insurance and mortgage societies, own 1,321,036 acres, the improved value of which is given by the commissioner of taxes at $12,916,405; and the unimproved value is by the same authority said to be equal to $9,467,690. From the foregoing figures, it will be observed that it has become necessary to take some steps to prevent the further accumulation of vast estates and the withholding of them from settlement and development. Though the graduated tax is not regarded as being too burdensome, yet it is to a large extent having the desired effect. Many of the immense estates are being freely offered to the government at their taxable value, while some are being cut up in suitable farms and offered at public auction. The following table shows the scale of graduated land tax in addition to the ordinary tax on land values:

Value.	Tax per £1	Value.	Tax per £1
	Pence.		*Pence.*
£5,000 to £10,000	0⅛	£70,000 to £90,000	1⅛
£10,000 to £15,000	0¼	£90,000 to £110,000	1¼
£15,000 to £20,000	0⅜	£110,000 to £130,000	1⅜
£20,000 to £25,000	0½	£130,000 to £150,000	1½
£25,000 to £30,000	0⅝	£150,000 to £170,000	1⅝
£30,000 to £40,000	0¾	£170,000 to £190,000	1¾
£40,000 to £50,000	0⅞	£190,000 to £210,000	1⅞
£50,000 to £70,000	1	£210,000 or exceeding that sum	2

NOTE.—One penny = 2 cents; £1 = $4.8665.

RATES OF TAXES.

The rates of taxes for 1892–'93 were: Ordinary land tax, 1*d.* per pound sterling, and the graduated tax already referred to commenced at one-eighth of a penny per pound on the unimproved value of the land and rose to 2*d.* where the unimproved value of the land of an owner was £210,000 or exceeded that sum. The rate of income tax was 6*d.* per pound on the first taxable £1,000—*i. e.*, after deducting the £300 exemption—and 1*s.* per pound on taxable incomes over £1,000. That is, a person having an income of £1,900 would be thus taxed: £300 would be exempt, £1,000 would pay 6*d.* per pound, and the remaining £600 would pay 1*s.* per pound, making a total of £55 per year the income-tax payer would have to pay on an annual income as above stated. The tax on an income of £400 would be at 6*d.* per pound on £100—£300 being exempt—equal to £2 10*s.* per annum.

In 1891, as already mentioned, the property tax was abolished and a tax on improvements substituted. In 1892 the tax act was so amended as to exempt all improvements under £3,000 in value, and in 1893 improvements of every kind were exempted and an income tax introduced instead. By the abolition of the tax on improvements a loss to the revenue of the country was sustained equal to about £37,000, but this loss will be compensated for in some degree by the scale of graduated tax having been increased.

Thus in three years the entire system of taxation has been almost completely changed, and, it is gratifying to say, with the most beneficial effect. Each change made was in the direction of relieving those who were least able to pay and making those to whom the additional burden of taxation would make no material difference contribute (what they had not hitherto done) a fair share of the revenue required in proportion to their means.

By the £500 land-tax exemption, to which every landowner, great and small, is entitled, and the exemption of all incomes under £300 the small farmers and laborers are immensely benefited. These exemptions, however, only apply to state taxes. For local purposes all have to contribute who have assessable property. The laborers and smaller farmers—in fact, all who come within the sphere of these exemptions—are very grateful for the paternal solicitude manifested in their behalf. At the late general election, held November 29, 1893, they have in the most pronounced manner demonstrated their appreciation of what has been done for them by electing those to whom they owe so much with the largest majority ever given a government in New Zealand.

It was persistently alleged by the banking and moneyed institutions generally, and also the large landowners, that the radical changes made in the incidence of taxation would result in such a serious loss to the revenue of the country that borrowing must again be resorted to immediately to defray the expenses of the government, but the results have proven they are not prophets.

The following analysis of a report on the "Incidence of Taxation" submitted to Parliament by the commissioner of taxes July 28, 1893, is conclusive and practically substantiates the assertion in the preceding paragraph.

The attached table gives a classification of land and income tax payers by occupation or designation and of companies according to the business they carry on. Results are contrasted with those of the last assessment for property tax in 1888, which were published in 1889.

Under both systems of taxation the largest contributions were by graziers, sheep farmers, farmers, dairymen, etc., that is, by owners of county lands; the total for land and income tax being £89,341 and for property tax £81,544. The number of property-tax payers was 8,611. The number of land-tax payers is 4,760, who are assessed £60,203 for ordinary land tax; 766 are assessed £28,015 for graduated land tax; and 97 are assessed £1,123 for income tax. In considering these and other results, it should be remembered that some who pay graduated tax do not pay land tax in some instances; but it may be taken to be the rule that the land-tax payers include those who pay graduated tax, and the number of the latter is omitted in these comparisons. Further, some of those who pay land tax also pay income tax. Land companies (fifteen in number) were assessed £12,049 for property tax, and land companies (nineteen in number) were assessed £16,597 for land tax and £15,232 graduated tax, making up, with £396 for income tax, a total of £32,207, which shows an increase of £20,158 in the present system. Loan companies contribute now £30,923 for land and income tax, as against £38,147 property tax; life-insurance companies, £11,790, as against £11,749; fire and marine insurance companies, £8,279, as against £6,652; banks pay £10,184, as against £14,244 under the property tax; mercantile companies, £16,302, as against £9,384; manufacturing companies, £7,549, as against £3,784 under the former system; manufacturing and mercantile companies, £5,622, as against £5,807; coal-mining companies, £1,125, as against £1,498; gold-mining (23 companies), £2,735, as against (113 companies) £2,545; building societies, which were not assessed for property tax, £1,987; church property, corporations, and trusts, £2,736, as against £2,406.

The above figures show that, with few exceptions, the tendency is toward increasing, rather than decreasing, the taxable property, and at the same time in such a manner as not to make it oppressive upon those on whom the increased weight of taxation has fallen. In amounts paid by persons the table shows that, as a rule, the totals contributed in the various classes under the two systems under review do not differ very materially excepting in the class including working store men, mechanics, laborers, shepherds, miners, sailors, etc. Of the workers, 2,242 generally paid property tax amounting to £4,053 and 249 paid land and income tax amounting to £543 only—a decrease in the number of working-class taxpayers of nearly 2,000 under the present system and a decrease in the amount now paid of £3,510.

The number of taxpayers has decreased under the present land and income tax by 9,028, while the revenue has been increased £19,921. It is to the absentee and graduated tax the increase may reasonably be attributed.

Classification of taxpayers according to occupation.

Designation.	New system.							Old system.	
	Land tax.		Graduated land tax.		Income tax.		Total.		
	Tax-payers.	Tax.	Tax-payers.	Tax.	Tax-payers.	Tax.		Tax-payers.	Tax.
Professional (clergyman, lawyers, doctors, authors, editors, engineers, surveyors, and architects)...	449	£6,612	42	£755	652	£6,153	£13,520	1,155	£11,677
Civil servants, officers of local bodies, teachers, etc.	173	773	5	10	391	1,498	2,281	547	2,216
Retired professional men, merchants, and others.....	154	6,610	45	1,660	89	692	8,962	342	12,808
Merchants, importers, warehousemen, contractors, etc.:									
Firms	92	2,603	22	243	111	8,383	11,229	336	10,326
Persons	300	5,770	56	1,306	127	2,010	9,086	667	9,658
Tradesmen, wholesale and retail shopkeepers, storekeepers, carriers, etc.......	1,251	6,182	41	204	558	5,592	11,978	3,156	14,721
Working store men, mechanics, laborers, shepherds, miners, sailors, etc.	220	474	2	7	29	62	543	2,242	4,053
Manufacturers, brewers, millers, founders, sawmillers, shipbuilders, etc..	170	1,697	19	175	139	2,280	4,152	525	5,046
Graziers, sheep farmers, farmers, dairymen, etc....	4,760	60,203	766	28,015	97	1,123	89,341	8,611	81,544
Land, commission, or general agents, auctioneers, accountants, brokers, commercial and other managers, clerks, bookkeepers, master mariners.	397	4,220	35	323	914	6,112	10,655	1,858	13,675
Widows, wives' trustees, spinsters.........................	1,837	13,574	57	689	58	483	14,746	3,760	22,274
Other trust estates and estates of deceased persons.	1,522	33,455	210	6,738	26	362	40,555	1,492	32,287
Absentees	784	21,053	114	4,109	20	139	25,301	1,150	25,977
Companies:									
Banks.........................	6	4,596	6	2,512	4	3,076	10,184	6	14,244
Life insurance............	6	6,771	6	446	8	4,573	11,790	10	11,749
Loan..........................	30	26,567	14	2,700	15	1,656	30,923	36	38,147
Land..........................	19	16,579	13	15,232	3	396	32,207	15	12,049
Mercantile..................	36	4,850	9	492	84	10,960	16,302	101	9,384
Manufacturing............	23	1,832	8	463	44	5,254	7,549	58	3,784
Manufacturing and mercantile...............	15	1,495	5	791	21	3,336	5,622	28	5,807
Mining—									
Coal.....................	6	92	2	8	7	1,325	1,425	10	1,408
Gold....................	....	....	....	....	23	2,735	2,735	113	2,545
Fire and marine insurance........................	9	2,631	3	221	28	5,427	8,279	33	6,652
Building societies.........	37	1,968	1	19	....	....	1,987	....	....
Church property (corporations and trusts).............	64	1,974	10	762	....	....	2,736	76	2,046
Total.......................	12,360	232,581	1,491	67,880	3,448	73,627	374,088	26,327	354,167

THE SINGLE TAX.

That there is very little difference between the present land tax and the single tax as proposed by the single-taxers, as they are called here in New Zealand, is easily shown. The principal points of difference may be briefly explained. The single-tax would be levied at a uniform rate and without exemption upon all properties, irrespective of size. The mortgagee would be treated in precisely the same manner as the owner, *i. e.*, it would consider him as being part owner of the improvements, as well as of the land. There would be no absentee tax; all landowners would be treated alike. The £500 exemption, the absentee and graduated tax (exclusive of the income tax) are the only diverging features as between the single tax and the present land tax. The absentee tax might be easily dispensed with, even without any appreciable loss, were it not for the evil it is designed to correct, viz, absenteeism. A loss of about £70,000 per year would be sustained by the abolition of the graduated tax; but this could soon be remedied by adding it to the ordinary tax, the only difficulty being that the abuse caused by large estates would continue as at present without any special effort being made to improve or subdivide them. There is not, however, any insuperable objection to having the absentee and graduated tax merged with ordinary tax, but there is an objection to the abolition of the £500 exemption. This would immediately bring a large class of small, struggling farmers into shallow water. These are the people who would suffer most by the substitution for the present system of the single tax. I am quite aware of the arguments the single-tax people would offer to this objection. We would be told that "equality of sacrifice is only common justice," and that the burdens of land taxation should be equally distributed in proportion to the value held by each individual. I can not afford to discuss that subject here. I have simply tried very briefly to explain the difference, which is very little between the land tax and the single tax. In principle they are practically the same, the only difference being in matters of minor detail which can and may be soon overcome. Once the income-tax act is repealed, the rest is easy; this is in reality the only practical difference. The loss on account of income tax would be less than £74,000 per annum. Although I do not think there is any likelihood that the single tax will be adopted here in the near future, yet there is no denying the striking similarity between the two, and that they can be easily assimilated is understood. But I question the wisdom of such a step, as I believe, from my knowledge of the country farmers, they would resist to the bitter end—if, indeed, they did not rise in open revolt—for they look upon the single tax with horror, and regard its introduction as little less than spoliation. Whether they are justified in this extreme view of the matter, I am not prepared to discuss. Strange to say, the most enthusiastic single-tax advocates are found among the landless in the large centers of population. I have not yet met a farmer in this country—and I have taken some pains to ascertain their views on the subject—who is a believer in the single-tax theory. I do not say there are none here; if there are, I have not met them, neither have I heard of them. I have heard, however, that a few of the county councils are disposed to adopt the single-tax principle in making their levy for local purposes. Should local bodies take kindly to this principle of taxation, and should they find it to be just, equitable, and satisfactory, then it is only a matter of a very short time before Parliament accepts it as the national system. The fact is, the present mode of taxation—land and income—is only one degree removed from the single tax.

JOHN D. CONNOLLY,
Consul.

AUCKLAND, *January 25, 1894.*

THE INCOME TAX IN SWITZERLAND.

No income tax in Switzerland is levied by the Federal Government. This form of taxation, so far as it prevails here, is purely cantonal. Among the cantons in which an income tax is imposed are the wealthy and industrial ones of Basle, Zurich, and St. Gall; the canton of Geneva thus far has not adopted it.

With a view to ascertaining particulars with regard to the form of the Swiss income tax, and also with a view to ascertaining its popularity or unpopularity as compared with other taxes, the following questions were submitted by me to the consuls of the United States at Basle and Zurich:

(1) What is the plan of direct taxation which prevails in your canton?

(*a*) Are the incomes from estates (real and personal property) taxed, as well as the estates themselves?

(*b*) What is the smallest estate that is taxed, and what is the lowest income that is taxed?

(*c*) How does the tax run in the case of both estates and incomes? Is it so much for each 1,000 francs up to any sum, or does it progress after a certain sum is reached? Thus, for example, is it 1 franc in the 1,000 up to 2,000 francs of estate or income and then 1.1 francs in the 1,000 up to, say, 50,000 francs of estate or income, and then 1.2 francs in the 1,000 up to, say, 80,000 francs of estate or income?

(2) Is the income tax comparatively a popular one or not?

(3) Do capitalists seriously object to it?

(4) Are the incomes of corporations taxed? If so, at what rate?

(5) What officials collect estate and income taxes?

(6) Do capitalists grossly undervalue their estates and misrepresent their incomes?

(7) What method can the collectors employ for getting at the truth?

(8) What are the penalties for willful misrepresentations?

(9) Does the property or income tax in your city and canton seem to work unjust discrimination between classes?

BASLE.

From Mr. Gifford, the consul at Basle, the following report was received:

(1) No less than four direct taxes are levied in this canton and city, which territorially are substantially identical, viz: (1) A property tax, (2) a cantonal income tax, (3) a city income tax, and (4) an inheritance tax.

(*a*) Estates, real and personal, and the incomes from them are both taxed.

(*b*) The smallest estate taxed is 5,000 francs; the smallest income, 800 francs.

(*c*) The property tax is not progressive. The taxpayers are arbitrarily divided into classes according to the amount of their property and then taxed one-tenth of one per cent on the lowest of the two sums defining their class. For instance, the first class, composed of persons possessing from 5,000 to 8,000 francs, pay one-tenth of one per cent on 5,000 francs; the thirty-third class, with property amounting to 2,500,000 to 3,000,000 francs, pay at the same rate on 2,500,000 francs. From this point upward the two sums determining the classes differ uniformly by 500,000 francs. Accordingly, the property tax is to a certain extent the reverse of progressive, since the system of classification permits, in a possible case, 500,000 francs to escape taxation altogether.

The cantonal income tax is progressive. It is established at a fixed sum of 5 francs for incomes of 800 to 1,200 francs and in specific cases to 1,800 francs; from this point to 4,000 francs it is one per cent; from 4,000 to 12,000 francs, 3 per cent; and 4 per cent for all larger incomes.

The city income tax is also progressive, but is modified by the system of classification, which is again applied. The first class, income from 800 to 1,500 francs, pays 6 francs; second class, income from 1,500 to 2,000 francs, pays 10 francs; ninth class, income from 40,000 to 60,000 francs, pays 500 francs. It will be seen that the first class pays from three-quarters to two-fifths of one per cent; the ninth class from one and one-quarter to four-fifths of one per cent. In every possible case, then, the highest classes pay a larger percentage than the lower ones.

An inheritance tax is levied on all property amounting to more than 400 francs passing by will or otherwise from a deceased person to other than direct descendants. Parents pay 2 per cent; grandparents, other ascendants, brothers, and sisters, 4 per cent; uncles and nephews, 6 per cent; first cousins, 9 per cent; all other persons, 12 per cent.

(2 and 3) None of these taxes seem to be more unpopular than taxes in general, and capitalists do not complain of them on account of their form. Their number and the amount required to meet them and numerous indirect taxes are, of course, under certain circumstances felt to be a burden.

(4) The incomes of corporations are not directly taxed.

(5) The canton being extremely small, the taxes are required to be paid to the cantonal treasurer at his office in the city.

(6) Cases of gross undervaluation of estates and misrepresentation of incomes occur, but in this canton it is not thought that such cases are frequent.

(7) The system of "self-taxation" has been adopted. In conformity therewith, the taxpayer delivers personally to the treasurer a sum which he verbally declares to be the amount legally due from him. He may, however, send the amount in a sealed package accompanied by a written declaration as to its correctness. In case the tax commission doubt the correctness of this self-taxation, they can require proofs. Should these proofs be deemed unsatisfactory, the amount to be paid is determined by the commission; but from the decision of these authorities the taxpayer may appeal to the Government council within fourteen days.

(8) The penalty for willful misrepresentation of income or estate is the payment of from two to five times the difference between the amount of the tax declared and that found to be correct. This penalty is enforced against the estate of a deceased person if the error or fraud is discovered within ten years after it was committed. This fact, no doubt, operates very decisively as a restraint on misrepresentation, since either the civil court or a notary generally participates in the administration of estates; and both are bound to notify the authorities of errors or frauds in regard to the payment of taxes which they may discover.

(9) The prevailing opinion here is that the property and income taxes do not operate as an unjust discrimination between classes.

In addition to the reply made by Consul Gifford to question No. 2, the following extract from his report on taxation, made in 1888 (CONSULAR REPORTS, November and December, 1888, Nos. 99 and 100, p. 628*) is herein given:

> The popular nature of this tax [income tax] is shown by the following table, from which it appears that the 535 taxpayers of the highest class pay four times as much as the 7,397 persons belonging to the five lower classes:

Class.	Number of taxpayers.	Amount of tax.	Percentage of taxpayers.	Percentage of tax.
		Francs.		
First, at 5 francs	2,237	11,180.00	28.2	1.15
Second, at 10 francs	1,380	13,800.00	17.4	1.42
Third, at 1 per cent	2,587	65,775.80	32.62	6.76
Fourth, at 2 per cent	920	66,959.87	11.6	6.89
Fifth, at 3 per cent	273	47,898.45	3.44	4.93
Sixth, at 4 per cent	535	766,698.88	6.75	78.85
Total	7,932	972,318.00	100	100

Apropos of this quotation from Consul Gifford's report in 1888, it may be well here to repeat the observation thereon made by Consul-General Winchester:

> The design of the system [the income-tax system] is, of course, to throw the burden of taxation on those who are best able to bear it, and by the gradual enlargement of exemptions it is an easy matter to bring the entire burden of taxes on a few, which is illustrated in the statement of Consul Gifford as to Basle. It is an experiment that has its dangers, and is of very doubtful policy.

ZURICH.

From Mr. Germain, consul at Zurich, the suggestion has come that perhaps the report on taxation made by Consul Catlin in 1888 (CONSULAR REPORTS Nos. 99 and 100, pp. 634–649) may for the most part sufficiently answer the interrogatories submitted. I therefore extract from said report, which is very elaborate and exhaustive, the following concerning the income tax:

CANTONAL TAX LAW.

Title I.

SEC. 4. The profits and incomes of citizens, settlers, and existing corporations, domiciled within the canton, are subject to income tax.

SEC. 5. The following are exempt from income tax, viz: (*a*) The yearly revenue in interest, rent, or jointure, based upon any capital taxable as property; (*b*) the amount of 500 francs from every income. (See article 19, section 3, of federal constitution.)

SEC. 7. In estimating an income derived from the carrying on of any industry, there shall be deducted not more than 5 per cent of the working capital, and also the costs involved in the acquirement of the income, with exception, however, of housekeeping expenses.

SEC. 9. Liability to property and income taxation commences from the time when a person comes into possession of a taxable property or income * * *.

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* NOTE BY THE DEPARTMENT.—These numbers of the CONSULAR REPORTS are out of print.

Title II.—Income tax levy.

Of the taxable income of individuals (see sections 5 and 6) the following portion will be assessed, viz:[*] Two-tenths on the first 1,500 francs, four-tenths on the next 1,500 francs, six-tenths on the next 3,000 francs, eight-tenths on the next 4,000 francs, ten-tenths on all above 4,000 francs. Every 100 francs of income assessment pays 2 francs tax for every franc per thousand levied on property assessment.

Under title III it is provided (1) that each taxpayer shall, in the first instance, state the amount of his own taxable income; (2) that a tax commission may revise such statement; (3) that, in contested cases, an appeal may be taken by the taxpayer (*a*) to a board of official appraisers, (*b*) to a board of appeal.

Under title V it is provided that a taxpayer who has made an incomplete declaration shall be subject to a supplementary tax of five times the deficiency in payments made to the canton during the two years last previous. A further provision is, that concealment of property, with a view of preventing official inventory, shall be punished by requiring the payment of tenfold the tax evaded for the current year.

The effect of the Zurich income tax upon different property-owners is thus illustrated by Mr. Catlin:

Mr. E. F., silk manufacturer; age, 42; married; has family of children; owns mill plant worth 80,000 francs, dwelling worth 75,000 francs, and other property in stock and money amounting to 60,000 francs; total property, 215,000 francs. Net profit from silk mill, 30,000 francs per annum.

Income tax: His annual income from his factory being, as stated, 30,000 francs, he is allowed, in declaring his taxation (see section 7, cantonal tax law) to deduct therefrom 5 per ent of his working capital (80,000 francs + 60,000 francs = 140,000 francs), *i. e.*, 7,000 francs. He is also allowed to deduct 500 francs exempt by law.

	Francs.	Francs.
Consequently his taxable income is		30,000
Less 7,000 + 500		7,500
Leaving gross taxable income of		22,500
Two-tenths on the first	1,500 *i. e.*, on	300
Four-tenths on the next	1,500	600
Six-tenths on the next	3,000	1,800
Eight-tenths on the next	4,000	3,200
Ten-tenths on the remaining	12,500	12,500
Making his net taxable income		18,400
At 8 per cent		1,472

Mr. G. H., capitalist; age, 60; married; keeps house; owns row of dwellings worth 1,500,000 francs; money on bond and mortgage, 1,450,000 francs; stocks and other securities, 500,000 francs; cash and miscellaneous, 50,000 francs. No other income than that derived from above property.

Income tax: He has no other income than the yield of the capital above taxed as property.[†] [Hence he pays no income tax.]

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[*] The rate is 8 per cent.

[†] See general observations at end of report.

ST. GALL.

In the case of St. Gall, conversations with leading business men and capitalists and an examination of official publications enable me to reply as follows to the questions propounded at the beginning of this report:

(1) The direct taxes levied are quite numerous, comprising a cantonal or state tax, a parish or town tax, a school tax, a church tax, a fire-insurance tax for houses, a house tax, an inheritance tax, a military tax (as have all the cantons), a fire-brigade tax, and two income taxes—one for the canton and one for the parish.

(*a*) The income from estates (real or personal property), if in the form of rents or interest, is not taxed.

(*b*) An estate (real or personal property) under 2,000 francs ($386) is exempt from taxation. The tax on incomes is as follows:

Income.	Tax.	Income.	Tax.
	Francs.		*Francs.*
800 to 999 francs	1	5,500 to 5,999 francs	63
1,000 to 1,499 francs	2	6,000 to 6,499 francs	76
1,500 to 1,999 francs	4	6,500 to 6,999 francs	90
2,000 to 2,499 francs	7	7,000 to 7,499 francs	105
2,500 to 2,999 francs	11	7,500 to 7,999 francs	121
3,000 to 3,499 francs	16	8,000 to 8,499 francs	138
3,500 to 3,999 francs	22	8,500 to 8,999 francs	157
4,000 to 4,499 francs	30	9,000 to 9,499 francs	177
4,500 to 4,999 francs	40	9,500 to 10,000 francs	200
5,000 to 5,499 francs	51		

For every additional 100 francs, 2.50 francs more.

(2 and 3) The income tax is comparatively popular; even capitalists do not object to it.

(4) The incomes of corporations, limited companies, are taxed. Corporations pay, as cantonal income tax, 5 per cent on their profits after deducting a dividend of 4 per cent.

(5) The parish or town treasurer collects the income tax.

(6) Undervaluation of estates is hardly possible—a taxation commission fixes the value thereof. Incomes are somewhat misrepresented, as will be the case anywhere.

(7) Among the means employed for ascertaining the true worth of estates and amount of income are the following: Inquiry at banks and other places, magisterial and judicial investigation; after death official inventories are taken and taxes collected for ten years back in case of discovery of assets concealed during that length of time.

(8) Misrepresentation is punished (when discovered during the lifetime of the individual) by collecting the difference between taxes paid and due and those which should have been paid for ten years back, if the misrepresentation has continued so long.

(9) Neither the property nor income tax system is here regarded as making an unjust discrimination between classes.

GENERAL OBSERVATIONS ON THE FOREGOING REPORTS.

It will be observed in the case of the canton of Zurich that under a provision of section 5 of title I of the cantonal tax law the yearly revenue in interest or rent based upon any capital taxable as property is exempt from income tax, and that (because of this provision) a man (Mr. G. H.) worth 3,500,000 francs ($675,500) pays no income tax whatever. The reason of this is that he already pays a heavy tax upon the property itself. Yet it also will be observed that in the case of Mr. E. F., whose total capital is 215,000 francs ($41,495), but whose investment is a mill plant, an income tax is collected, despite the fact that a full property tax is also collected.

The same exemption in favor of the capitalist with his money invested in interest-bearing securities, etc., also exists in the canton of St. Gall.

But, whatever may be thought of the justice of this arrangement, it remains true, as Consul Catlin observes at the end of his report, that in Switzerland "the capitalist with his millions [in whatever invested] is taxed at a rate many times higher than the workingman with no property, who in the struggle for existence can lay by nothing and must necessarily live from hand to mouth."

The "progressive" feature in taxation, which is so marked a characteristic of the Swiss system, and which exists often in the case both of property and incomes, is well worth careful consideration. Upon this and other points the following, from Mr. J. M. Vincent's "State and Federal Government in Switzerland," a book compiled largely under Swiss auspices, may be found suggestive:

> In regard to the progressive system, it is safe to say that it has met with the approval of the people wherever adopted and is gradually gaining wider acceptance.
>
> This popularity is doubtless largely due to the fact that, by this method, a large number of small taxpayers can make a minority of rich men bear the greater part of the load. There is, however, a principle of justice in the idea that the wealthy man ought to contribute, not only in proportion to his goods, but in increasing proportion as he becomes wealthier, and the experiments tried in Switzerland have tended to equalize the burden and to break down the division between the classes; but no system of taxation has yet been found which works perfectly, nor is there one which satisfies both Government and people. Swiss finances suffer from a disease not unknown in America, namely, undervaluation, or, plainly speaking, tax-dodging. The principle of self-taxation, or the listing of property by the taxpayer himself, is vigorously insisted upon, as if it were a natural right of man; but, although the detection of fraud and punishment of obstinacy are placed in the hands of tax commissioners, the temptations to underassessments are too great. Consequently, in many places rates are high, and in reality the pressure of taxation is heavy. This is especially true of the great industrial centers, where much more public money is expended than in the agricultural states. Hence there is more or less casting about for new financial expedients of an indirect kind, now that the alcohol monopoly has proved to be fruitful. Indeed, an eye is turned upon the federal tariff to see if that can not be stiffened somewhat for the benefit of the taxpayer. The burden of direct taxation per capita of population is not excessive, but this does not altogether reveal the weight laid on the persons who actually contribute. Although not arrived at a critical point, the questions of taxation are causing earnest consideration on the part of her economists.

IRVING B. RICHMAN,

ST. GALL, *January 30, 1894.* *Consul-General.*

COST OF LIVING IN TUNSTALL.*

Associated with the subject of the wages of the laboring classes is always the purchasing power of the money earned. Statistics are often useless, and more often worse than useless; they are misleading, unless they are completely given; and a full explanation added of the circumstances, conditions, and locations attendant upon their compilation. For example, it is unfair to compare the resident of New York city, who pays high city rents, purchases his clothes from a fashionable tailor and his provisions from a "fancy-price" dealer, with a resident of a district such as this—the Staffordshire pottery district, where rents are low, clothing cheap, and market produce and fuel also cheap, being products of the immediate neighborhood. The only just and fair way is to compare city with city—New York with London, Philadelphia with Manchester, the American pottery district with the Staffordshire pottery district. The wants and the demands of the districts are similar.

After a very thorough investigation of the different elements entering into the cost of living of the workingman in Trenton, N. J., and in Burslem, Staffordshire, England, I beg to submit, in as condensed a form as possible, the facts thus arrived at.

The very wide range of styles and qualities of much of the merchandise entering into the said investigation makes it impossible to compare them accurately, unless the actual article is before you; in such cases I have compared as closely as possible style with style, quality with quality.

The subject naturally divides itself into three divisions—house rent, clothing, and food.

HOUSE RENT.

In the United States we consider the rent paid for the house a fixed quantity, and the fact that a house in Trenton, containing six or seven rooms, rents for $8 per month, and a similar one as to the number of rooms in Burslem rents for $4 per month, would at once strike one that the difference in house rent was very great. In England, however, there are other expenses to be paid by the tenant, and the difference in the construction of the house in itself entails additional outlay.

What does the workingman get for his $8 in Trenton, and what does he get for his $4 in Burslem? In the former he has a house with a good cellar under the entire house; hot and cold water in his kitchen, and in many cases in other parts of the house; closets in almost every room; gas; and generally a nice little garden, the size depending on the part of the city. In the latter, in many cases, a set of brick walls, built upon the surface of the ground, with only a shallow foundation. Where there is a cellar it is only a small one under one room, a cold-water tap, sometimes inside and sometimes outside the kitchen; no closets, necessitating the expense of "dressers," wardrobes, or movable closets of some sort on the part of the tenant; sometimes, but rarely, gas; and if any yard, a small one entirely paved with brick.

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*This report of Mr. Burgess, received April 19, 1893, seems to be referred to by Mr. Warner in the report that follows, which should be read in connection with it. (See p. 635.)

Beside the rent of $4, he must pay all rates, taxes, church tithes, and water rates on the property, and must keep the house in repair inside and leave it in good condition. There are other elements entering into the cost of living in England which may be named here, of which the American workman knows nothing, viz, stamp duties, licenses, etc. If he wishes a lease or perhaps a deed for the property, he must have said document stamped by the Government with a stamp of the value of from 15 cents to $2.50, according to the rental agreed upon. If he desires to go into domestic service, he or his employer must pay a Government license of $3.75 per annum. If he has a bright, intelligent son with a taste for the law, before he can become an indentured clerk to a "solicitor," he must first pay the "Crown" the sum of $400, and after completing his studies he must take out a further license at the cost of $250 before he can present a case in court or at the bar. If he wishes to become a notary public, he must be at a further cost of $150. If, however, the young man's tastes run toward medicine, a license fee of $50 is required before he can practice. There are perhaps more whose tastes run in the direction of matrimony; a special license for the same costs $25.

If the English workman has a little savings in the bank, he must pay the Government 2 cents for every check he draws. He must pay the same for every receipt he signs of amounts over $10. All notes or due bills must also bear a Government stamp of from 25 cents to several dollars, according to the amount. If he keeps a dog, he must have an annual Government license of $5 for each canine. If he keeps a gun, he must show a $2.50 license, and to shoot winged game he must pay $15. If he be a tradesman who keeps a horse or pony and wishes to keep a carriage for the pleasure of his family, he must pay the Government $2.50 per wheel per annum. Thus we find many more two-wheel than four-wheel carriages throughout all England. These, and many more of a like kind, are incidental expenses not often taken into consideration when comparing the costs of living, and might fairly be classed under the head of rent, as every householder feels them to a greater or less extent, and they become part of the annual cost of living, although not coming under the head of clothing or food.

CLOTHING.

As to matters of clothing, it is much more difficult to compare with any satisfactory degree of certainty; but when one takes into consideration the quality of the material, the fit, and general finish, one finds very little difference in the cost of the same article in the different countries. It will be remembered that the articles I have compared are of the cheaper grade and such as are used by the laboring classes.

Prices of clothing in England and the United States.

Articles.	England	United States.
Men's clothing.		
Cotton shirts (linen bosom)	$1.25	$0.75
Flannel shirts	1.50	1.25
Woolen undershirts	1.00	.75
Woolen drawers	1.00	.75
Hose	.25	.30
Boots	2.00	1.50
Shoes	1.50	1.25
Working caps	.20	.25
Hats (Derby)	1.00	1.50
Suit of clothes:		
Working	7.50	8.50
Sunday	12.50	15.00
Overalls	.65	.75
Handkerchiefs	.20	.20
Cuffs	.36	.30
Collars	.25	.20
Neckties (sailor-knot)	.25	.30
Gloves	.50	.75
Overcoats	7.50	10.00
Women's clothing.		
Cotton underwear (ready-made)	(*)	(*)
Woolen undervests	.65	.50
Woolen drawers	.90	.75
Hose	.25	.30
Shoes (low)	1.12	1.00
Stuff dresses	10.00	12.50
Cotton dresses	4.25	5.00
Hats	1.00	1.25
Bonnets	2.00	3.50
Shawls	2.00	2.60
Handkerchiefs	.12	.12
Collars	.16	.15
Kid gloves	.50	1.00
Corsets	.77	.75
Under jacket	7.50	9.00
Boots (high)	2.62	2.00

* Will average 20 per cent cheaper in the United States.

There is little difference in the aggregate cost of children's clothing. While the boots, cotton and woolen underclothes, collars, and cuffs are slightly cheaper in America, in outside clothing, hose, and hats the little difference would be in favor of England.

HOUSE FURNISHINGS.

Prices of house furnishings in England and the United States.

Articles.	England.	United States.
Kitchen table	$2.50	$1.50
Kitchen chairs	.85	.67
Dining table (10-foot extension), oak	12.50	8.50
Dining chairs	2.00	1.00
Sideboard	24.00	15.00

Prices of house furnishings in England and the United States—Continued.

Articles.	England.	United States.
Parlor suite	$40.00	$32.50
Hatrack	10.00	7.50
Bedroom suite (cottage hard wood)	30.00	23.00
Bed springs	4.00	2.70
Pillows ... per pair	3.25	2.50
Bolster	3.25	2.50
Mattresses:		
Hair	12.50	10.00
Cotton-wool	9.00	8.00
Wardrobe	12.50	8.00
Cotton sheets ... per pair	1.50	1.15
Blankets (8 pounds) ... do	4.00	4.00
Cotton quilts	1.25	1.00
Table cloths:		
White	1.37	1.25
Half bleached ... per yard	.25	.25
Napkins ... per dozen	.72	.75
Crockery ware, toilet (10 pieces)	1.50	1.75
Dinner ware (112 pieces)	5.00	6.50
Glass tumblers ... per dozen	.62	.35
Carpets:		
Tapestry ... per yard	.30	.50
Brussels ... do	.75	.85
Ingrain ... do	.43	.40
Oilcloth ... per square yard	.20	.25
Knives ... per dozen	1.00	.75
Forks ... do	1.12	1.00
Tin pail (half gallon)	.15	.12
Gridiron	.62	.50
Fry pan	.27	.30
Dish pan	.90	.75
Iron pots, tin-lined:		
5 pints	.50	.40
8 pints	.75	.55
Clothesline	.12	.15
Clothespins ... per dozen	.03	.01½
Iron teakettle	.50	.55
Mop	.25	.25
Broom	.20	.40
Scrubbing brush	.25	.20
Shoe brush	.29	.30
Stove brush	.29	.30

FOOD STUFFS.

The articles, however, which make up the great cost of living of every household are those which are at once consumed in their use, namely, the food stuffs, coal, oil, gas, etc. Many of these articles are fixed quantities and of comparatively fixed values, whereas others vary according to the season—*e. g.*, butter, eggs, etc.—and others as to the quantity or selection used. In such cases I have obtained the average maximum and minimum cost. The following is a comparative list, perhaps not complete, but sufficiently so to show the difference between most of the chief articles of daily consumption and to give a fair comparative table.

Price list of articles of daily consumption.

Articles.		England.		United States.	
Oatmeal	per pound		$0.05		$0.05
Bread	per loaf		.09		.10
Flour	per 25-pound bag		.85		.65
Baking powder, "Royal"	per half pound		.30		.25
Beef	per pound	$0.10 to	.22	$0.08 to	.20
Mutton	do	.10 to	.20	.06 to	.16
Sausage	do	.16 to	.18		.15
Pork	do		.16		.12
Ham	do		.16		.16
Bacon	do		.14		.16
Fish	do	.06 to	.24	.10 to	.25
Butter	do	.25 to	.45	.22 to	.45
Eggs	per score	.35 to	.80	.20 to	.80
Milk	per quart		.06	.06 to	.08
Tea	per pound	.40 to	.80	.30 to	1.00
Coffee	do	.25 to	.60	.25 to	.45
Cocoa	do		.40		.25
Lard	do	.16 to	.18		.13
Soap	do	.05 to	.10	.05 to	.25
Washing soda	do		.02		.04
Bluing			.20	.14 to	.20
Candles	per pound		.10		.12
Salt	do		.01		.01½
Pepper	do		.32		.35
Rice	do		.06		.08
Cornstarch	do		.14		.09
Cheese	do	.12 to	.24	.12 to	.25
Vinegar	per gallon		.20		.25
Potatoes	per bushel		.50		.50
Cabbage	each		.05		.06
Turnips	per peck		.24		.20
Parsnips	do		.24		.25
Onions	do		.24		.45
Tomatoes	do		.98		.20
Apples	do		.73		.35
Oranges	per dozen	.25 to	.50	.12 to	.30
Grapes	per pound	.20 to	.75	.10 to	.30
Raisins	do	.10 to	.12	.10 to	.12
Sugar:					
Granulated	do		.06		.06
"A"	do		.04		.05½
Powdered	do		.08		.08
Lump	do		.06		.07
Gelatin	per packet		.08		.10
Tobacco	per pound		.96		.40
Beer	per quart		.10		.25
Kerosene	per gallon		.20		.08
Gas	per 1,000 cubic feet		.70		2.00
Coal	per ton		4.50		5.00

CONCLUSION.

All the above prices I have procured from the most reliable sources—from houses carrying large stocks and catering particularly to the wants and purses of the masses.

I have no doubt that the question of quality will be advanced by some. I admit that in a few—a very few—instances the fact that the articles are made more heavily and substantially, as in the case of kitchen utensils, in England than in the United States would account for the slightly higher price in England; but, at the same time, the same argument holds good as to the superior quality of the American-made goods, as in the case of outside clothing, both in men's and women's—the fit, the finish, the style. I have noticed that to secure a good fit and a satisfactory finish one has to pay well for it even in England. I have, however, endeavored to be perfectly just in my comparisons, and, as stated, have compared only those articles which could be fairly compared as to quality, finish, durability, and utility.

W. BURGESS,
Consul.

TUNSTALL, *March 3, 1893.*

THE POTTERY INDUSTRY OF TUNSTALL.

In the northern part of Staffordshire, England, bordered by low hills, lies the consular district of Tunstall, commonly known as "the Potteries." It extends along a winding valley for a distance of 9 miles, and is made up of a series of semidetached towns, varying from 10,000 to 60,000 inhabitants each, the combined population being about 250,000. This chain of towns is traversed by a line of tram cars that run each way every fifteen minutes and by a "loop line" railroad that affords transportation each way every thirty minutes. Viewed from the summit of a hill overlooking the valley, one can see only a confused mass of oven stacks enveloped in clouds of smoke that the wind sometimes lifts, partially revealing the busy life below.

In this stretch of country are produced all classes of clay goods, from common stoneware and earthenware to the most expensive grades of the latter; also delicate china and ornamental creations of world-famed artists. The clay, worth to-day but a nickel, passes through the fingers of skill and genius and to-morrow becomes an almost priceless vase. That man can so cleverly stamp his inspiration upon forms of yielding matter gives an interest to the study of the pottery art that many branches of manufacture lack. In this report, however, I do not intend to treat the subject from the standpoint of its highest art, but simply as a manufacture, confining myself wholly to the factors of capital, cost of material, labor, and wages.

HOW EARTHENWARE IS MADE.

Before plunging into statistics, I shall give a brief account of the process of manufacturing earthenware, which is the principal product exported to the United States from this district, confining myself to those grades that find their way into the houses of the many, this report being intended for the masses who know nothing of the processes that reduce a lump of brown clay to a dinner plate. I do not intend to go into minute details, even if I were sufficiently acquainted with the business to be able to do so, but only so far as to make the remainder of my report intelligible to the general reader.

Earthenware is made from ball clay, china clay, flint, and stone. Ball clay comes from Devonshire and Dorsetshire. China clay comes principally from Cornwall, in the southwest part of England, although some is obtained in Devonshire. Flint is mainly obtained from France, while Cornish stone, which is not in such a state of decomposition as china clay, comes from Cornwall. None of these materials are found in Staffordshire. Ball clay forms the foundation of the ware, flint furnishes the whitening material, Cornish clay assists in making it whiter and less liable to break under a sudden change of temperature, and a small quantity of Cornish stone renders the ware more compact and of a closer texture. Thus each and all are necessary ingredients. The grinding of each material forms a trade of itself, though many manufacturers have mills of their own. The process is not unlike that used in polishing marble—a heavy stone, fastened to a bar, being made to pass over a surface paved with stone. Each material is in this manner ground with water until the mass is in a liquid state. The next stage consists in mixing the four ingredients together in such proportions as the manufacturer deems best for the purpose required, one mixture being as follows: Seventeen parts of ball clay, nine parts of china clay, five parts of flint, three parts of Cornish stone. After mixing, the liquid is run through a lawn seive to remove every particle of dirt, and then through magnets to extract the small particles of iron remaining in the mixture.

At this stage the liquid mass must be deprived of its superabundance of water, which is accomplished in this manner: Presses are made of wooden frames placed in a vertical position. When placed side by side a space is left in the middle. Each of these compartments is lined with a sheet of strong cloth folded in such a way as to form a bag. The liquid mass is then forced through the press by means of a hydraulic pump, the water filtering through the interstices of the cloth and escaping between the ribs of the frame. When the presses are taken down the solid clay is formed in the bags. It is then taken and passed through a "pug," which is a machine consisting of sharp knives on a rotary shaft, the clay coming out of this ready for the workmen to transform into various shapes.

The above description of the process of getting clay ready to work may not be the one followed in all establishments, but is substantially the method which I have seen in several manufactories. Clay is reduced into tableware by pressing (sometimes by the aid of a jigger and jolly), molding, throwing, and turning. A jigger is a potter's wheel, which consists of a round, plaster head upon which the molds are placed. This is made to revolve swiftly by means of an endless rope running under the bench, driving all the jiggers in the works. To form round, flat dishes, such as plates and saucers, a bat of clay is placed on the mold, and a jolly, acting as a lever, presses down upon the clay, reducing it to the shape required. Bowls and the bowl part of cups are made in molds, also revolving on the jigger, the handles of the cups being attached later. Other flat dishes, not round, and hollow-ware shapes are made in molds by hand, the patterns for which are drawn by the designer and fashioned by the modeler.

All molds are made from plaster of Paris, because it quickly absorbs the moisture in the clay. The making of molds is a distinct part of the potters' business. Some are made in one piece, others in several parts. Molds do not last long and require constant renewing.

Throwing consists in reducing a ball of clay, by means of the hands only, when placed on a jigger, to a hollow mass of nearly any design, forming vases, pitchers, jugs, etc. The success depends entirely upon the skill of the workman. By throwing the work is finished only on the inside, the outside being finished by a turner when the article is partially dried. This is accomplished in a manner similar to turning a piece of wood. Handles are made by pressing the clay in a mold and attaching to the cup or pitcher when both parts are sufficiently dried to keep their shapes when handled.

When clay is formed into the requisite articles by any of these methods, it is placed in the drying room, usually called the greenhouse. When the ware is sufficiently dried, the next step consists in "firing" it. A person unaccustomed to pottery terms will better understand this process if it is called "baking." The first firing, or baking, is in a biscuit oven. Ovens are of various sizes, shaped like a round pyramid, vaulted at the top, and covered by a chimney. Some are 19 feet in diameter and 20 feet high. The ware is placed in bake pans, called "saggars." Saggars are made of common fire clay, which is found in abundance in Staffordshire. The making of saggars is another distinct branch of the trade. The ware placed in these receptacles is packed in sand. The saggars are arranged in the oven one over the other in columns, called "bungs," each saggar forming the cover to the one underneath. Around the bottom of the oven are several openings in which fires are built. These flues join at the center. The firing is conducted at first slowly, then gradually raised to the proper temperature. The process requires great care and experience. It lasts from forty to sixty hours.

When removed from the oven, if the ware is to remain "plain white," it is ready for glazing; but if it is to be decorated with a printed pattern then that process follows. The designs seen on all kinds of printed ware are first engraved on copper plates. From these plates the pattern is transferred to the dish by means of thin tissue paper sized with soap, first being placed on the copper plates that have been rubbed with the color mixture, and then pressed tightly to the ware. When the paper has been removed by flinging the biscuit ware into water, the whole of the color remains on the dish. The ware must then be brought to a red heat to burn the oil mixed with the color. This is accomplished in the "hardening-on kiln." The next step is to glaze the ware. The preparation of the glaze is a delicate process and attended with serious consequences. It must not be too fusible or too hard, else the ware will dull or craze. The ware may not craze in weeks or years, but, if the glaze mixture is not perfect and not in touch with the biscuit ware, it will happen sometime. Glaze is made of borax, flint, lead, and stone, each ground with water to the consistency of cream and mixed. The proportions in the mixture are determined by each manufacturer, and are trade secrets. After dipping in the glaze and drying, the ware is taken to the glost oven for the next firing. It is again placed in saggars, but this time without sand, and so that no two pieces touch. This firing takes about twenty hours. When removed from the oven it is ready for the warehouse.

In this process, briefly described, it will be seen that greater skill can be attained, and the cost of production lowered, by having each workman perform a distinct operation. This is always done, so that in pottery language men are referred to as "jiggerers," "flat pressers," "cup-makers," "printers," "oven men," etc.

THE CAPITAL REQUIRED TO START A POTTERY.

The following division of capital will cover the amount required:

(1) Capital for land, buildings, machinery, fixtures, and utensils.

(2) Capital necessary for perishable stock, such as saggars, molds, and ware boards.

(3) Capital for production.

(4) Capital for carrying manufactured stock.

The capacity of the plant makes a vast difference in the cost of the buildings, while the location determines the value of the land. It makes a great difference whether land is bought worth $5 per square yard in the town or $1.25 per square yard in the outskirts.

Again, the capacity or number of ovens determines the cost of building, etc. Potteries usually consist of five, seven, nine, or some higher odd number of ovens. An even number is rarely found. This is on account of the different manner of packing ware in the saggars for biscuit and glost firing, as explained before. With ovens of the same dimensions, it requires three glost ovens to two biscuit ovens, or four glost ovens to three biscuit ovens, and so on in the same ratio. So far as I can learn, all potteries sending goods to the United States are built on this plan. At least I have been unable to find a six-oven pottery with ovens of the same dimensions on which to base a report. I have therefore taken five-oven and seven-oven potteries, and these of recent date, equipped with modern improvements. The estimates in tables No. 1 and No. 2 are taken from the books of the manufacturers. For the first item in each table two recently completed potteries furnish an exact estimate. The contractors' figures are the same. I know that old-time plants of the same capacity are sometimes sold for a less amount at bankrupt sales, but they are those that require thorough remodeling. The amount required for the second item—saggars, molds, etc.—varies greatly in different establishments. One pottery may confine itself to a distinct line of goods, and new molds are only required to replace those unfit for use. Another may constantly change the shape of the tableware and expend double the amount for molds in a given time. There are two factories of equal capacity and product shipping largely to the United States. One employs ten molders full time, the other only one molder, and he can not be furnished constant work. With saggars, about 12½ per cent are destroyed at each firing; other items under this head are not so variable. The amount given for this division of capital is taken from the books of the potteries under consideration.

The amount of capital necessary for production and the amount for carrying manufactured stock are arrived at in the same manner—from the books of the manufacturers. For the last item I have not taken the value of the manufactured stock on hand January 1, 1894, for the closing months of the year 1893 were months of great depression, but have taken the inventories of the years of active business. There are firms that carry constantly an amount of manufactured stock far in excess of the sum given in tables Nos. 1, 2, and 3, and some whose books show a less amount; but the estimates given are fair ones for those doing business with the United States.

I learn, also, that since the demand for a great variety of shapes has become manifest, manufacturers who cater to that taste are not able to carry the amount of finished stock that an establishment will carry that follows only one set line of goods with rare changes, for the shapes are liable "to go out" and leave dead or depreciated stock on its hands.

TABLE No. 1.—*Capital required for a five-oven pottery (biscuit oven 20 feet in diameter).*

Description.	Amount.	Description.	Amount.
Land, building, machinery, and utensils	$79,081	Ware boards	$973
Saggars, including labor	1,947	Working capital	72,997
Molds	6,570	Manufactured stock carried	48,665

TABLE No. 2.—*Capital required for a seven-oven pottery (biscuit oven 16 feet 6 inches in diameter).*

Description.	Amount.	Description.	Amount.
Land, building, machinery, and utensils	$72,997	Ware boards	$728
Saggars, including labor	1,704	Working capital	72,997
Molds	4,866	Manufactured stock carried	24,332

TABLE No. 3.—*Capital required for a seven-oven pottery (biscuit oven 19 feet in diameter).*

Description.	Amount.	Description.	Amount.
Land, building, machinery, and utensils	$145,995	Ware boards	$1,217
Saggars, including labor	2,433	Working capital	97,330
Molds	9,733	Manufactured stock carried	72,997

The material necessary for running a well-furnished pottery is given below, together with the average current prices. There is a great difference in the quality of the materials entering into the body and glaze of the ware, and correspondingly a difference in price. China clay showing "two shades off color" will reduce the price greatly. I simply quote an average price. For marl and coal, although there is a difference in the quality, the main difference in price is the nearness of the pottery to the beds and pits. I have not given the current price for straw, as it is a season of great scarcity, but the price at which it is ordinarily sold. The cost of each item is the cost at the pottery, that is, with freight and cartage added.

Articles.	Cost.	Articles.	Cost.
China clay .... per ton...	$9.73	Cobalt, prepared .... per pound...	$1.70
Ball clay .... do......	7.29	Saggar marl .... per ton...	1.46
Borax .... do......	146.00	Wad clay .... do......	1.82
Tincal .... do......	6.82	Sand .... do......	3.65
Flint, dry .... do......	11.19	Plaster of Paris .... per 100 pounds...	.49
Stone .... do......	13.38	Straw:	
Zinc oxide .... per pound...	.05	Oat .... per ton...	18.25
Lead oxide .... do......	.03½	Rye .... do......	19.46
Whiting .... per 100 pounds...	.49	Coal .... do......	2.43
Boracic acid .... per cwt....	6.33	Slack .... do......	1.34

In the following tables (Nos. 4, 5, and 6) I have taken the estimates from the books of three manufacturers whose potteries furnish the figures in tables Nos. 1, 2, and 3. I take these establishments as a basis because they are producing goods almost exclusively for the United States market. The various items are based on the number of crates given as the weekly product when running on full time.

TABLE No. 4.—*Cost of product of pottery turning out 100 crates per week.*

Description.	Amount.	Description.	Amount.
Materials	$87,597	Insurance	$170
Labor (productive and nonproductive)	90,517	Rent	4,866
Taxes (including income)	1,217	Interest	3,649
Gas and water	925		

Material : labor : : 48½ : 51½.
Total cost : labor : : approximately 2 : 1.

TABLE No. 5.—*Cost of product of pottery turning out 55 crates per week.*

Description.	Amount.	Description.	Amount.
Materials	$34,382	Insurance	$155
Labor (productive and nonproductive)	44,597	Rent	3,406
Taxes (including income)	1,703	Interest	3,649
Gas and water	705		

Material : labor : : $45\frac{4}{9}$: $54\frac{5}{9}$.
Total cost : labor : : approximately 2 : 1.

TABLE No. 6.—*Cost of product of pottery turning out 140 crates per week.*

Description.	Amount.	Description.	Amount.
Materials	$109,496	Insurance	$487
Labor (productive and nonproductive)	128,962	Rent	9,733
Taxes (including income)	1,946	Interest	4,866
Gas and water	1,405		

Material : labor : : 45⅓ : 54⅔.
Total cost : labor : : approximately 2 : 1.

LABOR.

In tables Nos. 4, 5, and 6 labor includes productive and nonproductive classes. The former work on the piece-price plan, the latter are paid by the day or week. For the former there is no standard or agreed price for the work entered into by the manufacturers or the potters' union, for so much depends on the conveniences of the pottery that a price list that would be fair in one establishment would be grossly unjust in another. This is a period of transition from old-time hand methods to improved machinery. Where the work is partly done by hand and partly by steam, the working price list is made up for hand work and discounts allowed by the workman for the use of the machine. In jiggered goods the combinations are as follows:

(1) Hand made, hand jigger, hand batter.
(2) Hand made, steam jigger, hand batter.
(3) Hand made, steam jigger, steam spreader.
(4) Jollied, hand jigger, hand batter.
(5) Jollied, steam jigger, hand batter.
(6) Jollied, steam jigger, steam spreader.

It will be seen from the above that working price lists made up on the different combinations must vary greatly. A discount of nearly 40 per cent must be taken from No. 1 to bring it to a basis of No. 6, and proportionate discounts from all the others. In the following working price list for Staffordshire the figures are based on the most improved combination (No. 6). For the American price list I have taken the one used by my predecessor.* The comparison is practically valueless, for the list may not be worked out from the same basis as the English. Unless every item is based on prices for jollied steam jigger and steam spreader work, the final differences are not only valueless, but misleading. Again, all comparative price lists are practically worthless unless the shapes and styles of the ware are known to be exactly the same. The same is true between potteries in Staffordshire, and the differences in the price lists of the establishments that I have visited (sometimes very great in ware classed as the same) are wholly due to peculiar shapes where methods and conveniences are the same. These I have avoided as far as possible, and taken the simplest styles. All prices in the following lists are for work "good from hand."

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*See No. 132, p. 49.

TABLE No. 7.—*Potters' working price list.*

Articles.	Net price paid for making per dozen.		Difference.
	English.	American.	
Flat pressed ware.			
Bakers:			Per cent.
3-inch	$0.075	$0.089	
4-inch	.075	.0979	
5-inch	.09	.1068	
6-inch	.09	.1157	
7-inch	.09	.1246	
8-inch	.13	.1424	
9-inch	.13	.1602	
10-inch	.13	.178	
11-inch	.13	.1958	
12-inch	.13	.2136	
Dishes:			
3-inch	.075	.089	
4-inch	.075	.0979	
5-inch	.09	.1068	
6-inch	.09	.1157	
7-inch	.09	.1246	
8-inch	.13	.1424	
9-inch	.13	.1602	
10-inch	.13	.178	
11-inch	.13	.1958	
12-inch	.19	.2136	
14-inch	.19	.2248	
16-inch	.22	.356	
Difference per cent			31.4
Pressed goods.			
Brush vases	.22	.445	
Covered butters	.57	.623	
Cake plates	.36	.534	
Covered chambers:			
6s	.79	.9345	
9s	.73	.8455	
Comports:			
7s	.37	.4885	
8s	.42	.534	
9s	.48	.5785	
Cuspidors:			
2s	.78	1.246	
1s	1.11	1.424	
Covered dishes:			
7s	.67	.989	
8s	.73	1.068	
9s	.78	1.2015	
10s	.84	1.335	
Covered casseroles:			
7s	.67	.9345	
8s	.73	1.0235	
9s	.78	1.157	
10s	.84	1.2905	
Creams:			
24s	.28	.4361	
30s	.26	.409	
Ewers:			
6s	.67	.89	
9s	.61	.801	
Mouth	.44	.409	

TABLE NO. 7.—*Potters' working price list*—Continued.

Articles.	Net price paid for making per dozen.		Difference.
	English.	American.	
Pressed goods—Continued.			
Jugs:			*Per cent.*
4s	$0.55	$0.8277	
6s	.51	.6764	
12s	.38	.534	
24s	.30	.4361	
30s	.26	.409	
36s	.26	.3471	
Salads:			
7s	.39	.6319	
8s	.44	.7292	
9s	.51	.8188	
10s	.56	.9167	
Sauce boats	.28	.4094	
Sauce tureens	.67	.9701	
Sauce stands	.24	.3204	
Sauce ladles	.10	.2403	
Slop jars	2.23	2.314	
Covered soaps	.44	.5785	
Soup tureens, complete:			
9s	1.78	2.67	
10s	2.01	2.8925	
Soup stands:			
9s	.44	.534	
10s	.44	.623	
Soup ladles	.20	.3115	
Parlor spittoons	.44	.6675	
Sugars:			
24s	.46	.623	
30s	.46	.5785	
36s	.42	.534	
Teapots:			
18s	.73	1.157	
24s	.67	.9701	
30s	.61	.8722	
Difference per cent			39.7
Jiggered goods.			
Bowls:			
24s	.035	.0535	
30s	.03	.0535	
36s	.025	.0535	
42s	.02	.0535	
Butters, individual	.02	.0328	
Basins:			
6s	.23	.368	
9s	.23	.328	
Cups:			
Coffee	.02	.0478	
Tea	.02	.0413	
After-dinner	.02	.0348	
Toy	.02	.0348	
Saucers:			
Coffee	.02	.0451	
Tea	.02	.0389	
After-dinner	.02	.0369	
Toy	.02	.0369	

TABLE No. 7.—*Potters' working price list*—Continued.

Articles.	Net price paid for making per dozen.		Difference.
	English.	American.	
Jiggered goods—Continued.			
Saucers—Continued.			
Fruit—			*Per cent.*
3½-inch	$0.02	$0.0328	
4-inch	.02	.0328	
4½-inch	.02	.0328	
5-inch	.02	.041	
Ice creams:			
3-inch	.02	.0328	
3½-inch	.02	.0328	
4-inch	.02	.0328	
4½-inch	.02	.0328	
5-inch	.02	.041	
6-inch	.02	.041	
Mugs:			
24s	.05	.0783	
30s	.035	.0606	
36s	.03	.0609	
42s	.025	.0522	
Nappies:			
3s	.06	.0918	
4s	.06	.1002	
5s	.085	.1085	
6s	.09	.1169	
7s	.09	.1336	
8s	.12	.1503	
9s	.145	.167	
10s	.145	.2004	
Plates:			
Flat—			
4-inch	.02	.041	
5-inch	.025	.066	
6-inch	.03	.0742	
7-inch	.03	.0825	
8-inch	.035	.0907	
10-inch	.04	.1066	
Deep—			
4-inch	.02	.0492	
5-inch	.025	.0742	
6-inch	.03	.0825	
7-inch	.03	.0907	
8-inch	.035	.0984	
10-inch	.04	.1148	
Festoon—			
5-inch	.025	.0825	
6-inch	.025	.0907	
7-inch	.03	.099	
8-inch	.035	.1072	
Deep:			
5-inch	.025	.0907	
6-inch	.025	.099	
7-inch	.03	.1072	
8-inch	.035	.1155	
Cake	.10	.205	
Cup	.03	.0328	
Difference per cent			90.1

TABLE No. 7.—*Potters' working price list*—Continued.

Articles.	Net price paid for making per dozen.		Difference.
	English.	American.	
Throwing.			
Bowls:			*Per cent.*
24s	$0.028	$0.0435	
30s	.0233	.0391	
36s	.02	.034	
42s	.0143	.034	
Mugs:			
24s	.028	.0522	
30s	.0233	.0435	
36s	.02	.034	
42s	.0143	.0261	
Sugars:			
24s	.135	.0957	
30s	.135	.087	
Difference per cent			10.8
Turning.			
Bowls:			
24s	.044	.06	
30s	.035	.055	
36s	.03	.05	
42s	.0266	.05	
Mugs:			
24s	.032	.085	
30s	.0266	.075	
36s	.0222	.07	
42s	.02	.06	
Sugars:			
24s	36	.195	
30s	.36	.185	
Difference per cent			8
Handling.			
Cups:			
Coffee	.02	.04	
Tea	.015	.03	
After-dinner	.015	.035	
Toy	015	.03	
Mugs:			
24s	.0325	.06	
30s	.0325	.06	
36s	.022	.06	
42s	.02	.06	
Difference per cent			118
Saggar-making.			
Common heights	.016	.0368	
Single banjo	.04	.0644	
Quarts	.036	.0414	
3 pints	.036	.046	
Slop jars	.036	.046	
Cup saggars	.03	.0276	
Hillers	.03	.0276	
Plate	.0238	.0552	
Do	.0162	.0376	
Wash bowl	.036	.0552	
Difference per cent			45.9
Average difference per cent			42

In the above table (No. 7) it will be seen that in producing one dozen each of the articles named in Staffordshire and Trenton there is a difference in labor cost of 42 per cent. But, as stated before, unless the American price list is based on work accomplished by the most improved methods, a reduction must be made from the figures given. That changes have taken place since the American price was compiled is shown from the following extract taken from the Trenton Daily True American of January 25 last:

To the Editor of True American.

SIR: During the present struggle statements have been made broadcast that the employers have made a proposal which means a reduction of 10 per cent. We repudiate these statements as misleading, as the following table shows. After a careful analysis of the new list, we have prepared the following table and respectfully invite perusal. Will you kindly insert this in the columns of your paper and oblige the Jiggermen Potters' National Union, Trenton:

PLATES.

Old list.

350 dozen 7-inch plates, 10 cents per dozen	$35.00
Less $2 for steam jigger	2.00
	33.00
Less 8 per cent reduction in 1885	2.64
	30.36
Less 5 per cent clay pugging	1.53
	28.83
Clay carrying, cleaning, and sweeping	2.25
	26.58
Attendants	12.00
Total	14.58

New list.

350 dozen 7-inch plates, 7⅕ cents per dozen	25.20
Less 20 per cent retained pending the Wilson tariff bill	5.04
	20.16
Attendants	12.00
	8.16

CUPS.

Old list.

1,000 dozen cups, 3 cents per dozen	30.00
Less 8 per cent reduction in 1885	2.40
	27.60
Clay carrying and pugging, 8 per cent	2.29
	25.31
Steam jigger	2.00
	23.31
Attendants	12.00
Total	11.31

New list.

1,000 dozen cups, 1⅘ cents per dozen	18.00
Less 20 per cent retained pending Wilson bill	3.60
	14.40
Attendants	12.00
Total	2.40

The above shows an average week's work of the above branches.

If the price list here given for plates and cups is correct, 8 per cent must be taken from the price list that I have used for 7-inch plates and corresponding percentages from all other plates. For cups 51.2 per cent must be deducted from the American list to conform to the price given in the Daily True American.

After the most careful investigation, I am convinced that if like articles could be compared in all branches of the trade, and all differences between methods and conveniences adjusted, there would not be over 20 per cent difference in the cost of labor (producing the articles in table No. 7) between Staffordshire and Trenton.

TABLE No. 8.—*Making price of molds and the price paid for blocking and casing in England.*

Articles.	Cost in wages.		
	Mold-making.	Blocking.	Casing.
Bakers:			
3-inch	24 cents per dozen	6 cents each	6 cents each.
4-inch	do	do	Do.
5-inch	do	do	Do.
6-inch	do	do	Do.
7-inch	42 cents per dozen	do	Do.
8-inch	do	do	Do.
9-inch	do	do	Do.
10-inch	do	do	Do.
11-inch	do	do	Do.
12-inch	do	do	Do.
Bowls:			
24s	38 cents per dozen	5 cents cach	12 cents each.
30s	do	do	Do.
36s	do	do	Do.
Punch—			
8-inch	11 cents each	30 cents each	30 cents each.
9-inch	do	do	Do.
10-inch	do	do	Do.
11-inch	do	do	Do.
Butters:			
Covered	39 cents each	52 cents each	58 cents each.
Individual	12 cents per dozen	12 cents each	12 cents each.
Casseroles, covered:			
6-inch	44 cents each		
7-inch	do		
8-inch	do		
9-inch	do		

TABLE No. 8.—*Making price of molds and the price paid for blocking, etc.*—Continued.

Articles.	Cost in wages.		
	Mold-making.	Blocking.	Casing.
Comports:			
7-inch	19 cents each	24 cents each	24 cents each.
8-inch	do	do	Do.
9-inch	do	do	Do.
Cuspidors, No. 3	79 cents each	97 cents each	97 cents each.
Creams	22 cents each	33 cents each	33 cents each.
Basins:			
Outside	96 cents each	36 cents each	36 cents each.
Inside	do	do	Do.
Cover dishes:			
6s	44 cents each	64 cents each	64 cents each.
7s	do	do	Do.
8s	do	do	Do.
9s	do	do	Do.
Cups:			
Coffee	24 cents per dozen	4 cents each	12 cents each.
Tea	do	do	Do.
After-dinner	do	do	Do.
Dishes:			
3-inch	do	6 cents each	6 cents each.
4-inch	do	do	Do.
5-inch	do	do	Do.
6-inch	do	do	Do.
6-inch (single)	do	do	Do.
7-inch	44 cents per dozen	do	Do.
8-inch	do	do	Do.
9-inch	do	do	Do.
10-inch	do	do	Do.
11-inch	do	do	Do.
12-inch	do	do	Do.
13-inch	do	do	Do.
14-inch	do	do	Do.
16-inch	67 cents per dozen	do	Do.
18-inch	do	do	Do.
Ice creams:			
3½-inch	14 cents per dozen	12 cents each	12 cents each.
4-inch	do	do	Do.
4½-inch	do	do	Do.
5-inch	do	do	Do.
Jugs:			
4s	36 cents each	42 cents each	42 cents each.
6s	28 cents each	do	Do.
12s	do	do	Do.
24s	22 cents each	33 cents each	33 cents each.
30s	do	do	Do.
36s	do	do	Do.
42s	do	do	Do.
Mugs (30s)	21 cents each	36 cents each	36 cents each.
Nappies:			
3-inch	42 cents per dozen	$1.22 per dozen	$1.22 per dozen.
4-inch	do	do	Do.
5-inch	do	do	Do.
6-inch	do	do	Do.
7-inch	67 cents per dozen	do	Do.
8-inch	do	do	Do.
9-inch	do	do	Do.
10-inch	do	do	Do.
Pickles	44 cents per dozen	$1.46 per dozen	$1.46 per dozen.

TABLE NO. 8.—*Making price of molds and the price paid for blocking, etc.*—Continued.

Articles.	Cost in wages.		
	Mold-making.	Blocking.	Casing.
Plates:			
Flat—			
5-inch	14 cents per dozen	49 cents per dozen	$1.34 per dozen.
6-inch	do	do	Do.
7-inch	16 cents per dozen	do	Do.
8-inch	20 cents per dozen	do	Do.
Deep—			
5-inch	14 cents per dozen	do	Do.
6-inch	do	do	Do.
7-inch	18 cents per dozen	do	Do.
8-inch	20 cents per dozen	do	Do.
Cake	44 cents per dozen		
Cup	22 cents per dozen		
Salads:			
8-inch	22 cents each	57 cents each	64 cents each.
9-inch	do	do	Do.
Sauce boats, complete	do	27 cents each	30 cents each.
Saucers:			
Coffee	14 cents per dozen	12 cents each	12 cents each.
Tea	do	do	Do.
After-dinner	do	do	Do.
Sugars (30s)	42 cents each	64 cents each	64 cents each.
Teapots	53 cents each	72 cents each	79 cents each.
Tureens:			
Sauce	49 cents each	do	72 cents each.
Stands	6 cents each		
Ladles	11 cents each		
Soup	79 cents each	$1.09 each	$1.09 each.
Stands	8 cents each		
Ladles	11 cents each		
Brush vases	28 cents each	33 cents each	33 cents each.
Basins	97 cents each	36 cents each	36 cents each.
Chambers, covered	63 cents each	91 cents each	91 cents each.
Ewers	38 cents each	58 cents each	58 cents each.
Mouth	28 cents each	42 cents each	42 cents each.
Soaps, covered	36 cents each	46 cents each	46 cents each.
Slop jars	$1.09 each	$1.46 each	$1.46 each.
Cup and mug handles	6 cents each	8 cents each	8 cents each.
Chamber and jug handles	do	9 cents each	9 cents each.
Daywork			$1.70 each.

NOTE.—The dozen referred to is a dozen of 12.

WEEKLY EARNINGS.

The Staffordshire potteries usually run full time (fifty weeks per year), thus furnishing steady employment to the workmen. This year the depression is great, and nearly all potters are running on short time.

I have taken the following table, based on the year 1891, because it was submitted to the "board of arbitration" that met that year to settle disputes between masters and men, and was admitted as correct by both sides. There has been practically no change since. It is based on twelve potteries, taking the average earnings in each with corresponding hours of labor. In each establishment there are those that earn much more than the average sum, but it is an exact average of the earnings of Staffordshire potters. As every one knows, much depends on the ability of the workman aside from mechanical skill. A man that has some worthy object to attain may earn double what a dissolute workman by his side will be able to gain. All the differences in men are so obvious that further comment is unnecessary.

TABLE NO. 9.—*Earnings in the different branches of the pottery industry, compiled from returns made by twelve manufacturers.*

Manufacturer.	Plate-makers.		Jiggerers.		Dish-makers.		Cup-makers (women).	
	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.
No. 1	$5.60	50	$10.22	50	$6.93	50	$4.62	50
No. 2	6.63	52	11.84	52	9.49	52	2.61	52
No. 3	6.94	41	10.46	42	6.33	45	3.83	34
No. 4	8.28	48	9.97	48	10.46	48	6.33	48
No. 5	7.55	54	8.52	54	6.82	52	8.75	55
No. 6	7.29	48	10.22	48	6.57	48	....	....
No. 7	4.88	42	....	....	7.20	48½	6.78	47
No. 8	8.03	50	18.25	50	7.29	50	....	....
No. 9	7.11	52	11.84	51	8.75	51	5.11	51
No. 10	8.75	53	10.70	53	11.68	53	13.38	53
No. 11	8.28	48	9.74	48	8.28	48	9.01	48
No. 12	6.57	51	7.79	51	8.52	51	6.57	51
Total	85.91	589	119.55	547	98.32	596½	66.99	489
Averages	7.16	49	10.87	49	8.19	49¾	6.69	49

Manufacturer.	Saucer-makers		Hand-basin-makers.		Hollow-ware pressers other than ewer-makers.		Ewer-makers.	
	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.
No. 1	$5.35	50	$10.22	50	$6.93	45	$6.93	45
No. 2	5.44	52	10.66	52	10.36	52	9.49	52
No. 3	4.86	46	5.66	32	8.64	41	6.93	41
No. 4	9.48	48	10.22	48	9.25	48	8.28	48
No. 5	7.29	54	8.53	54	9.25	54	6.57	53
No. 6	....	....	10.22	48	9.73	48	8.28	48
No. 7	4.02	48	7.72	42	7.10	48	6.88	49
No. 8	....	....	8.03	50	8.03	50	7.29	50
No. 9	4.38	51	12.01	51	9.32	51	7.39	51
No. 10	8.28	53	11.68	53	8.52	53	8.52	53
No. 11	9.01	48	6.81	48	8.64	48	8.52	48
No. 12	7.79	51	8.75	51	8.52	51	8.03	51
Total	65.90	501	110.51	579	104.29	589	93.11	589
Averages	6.59	50	9.21	48	8.68	49	7.76	49

TABLE NO. 9.—*Earnings in the different branches of the pottery industry, etc.*—Continued.

Manufacturer.	Printers.		Transferers.		Oven men.		Saggar-makers.	
	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.	Wages.	Hours.
No. 1	$6.93	50	$2.98	50	$6.69	54	....	....
No. 2	7.81	52	2.59	52	6.69	52	$8.77	52
No. 3	6.82	49	3.34	49	7.28	47	7.73	56
No. 4	7.11	48	3.00	48	6.69	48	....	....
No. 5	6.57	54	3.28	54	6.69	55½	9.97	59
No. 6	6.57	48	3.04	48	6.69	48	8.03	48
No. 7	5.17	47	2.61	47	6.69	48	6.69	48
No. 8	8.52	50	3.65	50	8.03	50	....	....
No. 9	7.85	49	3.34	49	8.35	50	7.29	52
No. 10	....	....	....	....	6.69	53	7.29	53
No. 11	8.02	48	3.65	48	6.69	48	7.29	48
No. 12	6.69	51	2.43	51	6.82	51	9.73	51
Total	78.06	546	33.91	546	84.01	604	77.70	467
Averages	7.10	49¼	3.08	49¾	7.00	50½	8.63	52

Manufacturer.	Mold-makers.		Turners.		Handlers.		Throwers.	
	Wages.	Hours.	Wages	Hours.	Wages.	Hours.	Wages.	Hours.
No. 1	$8.03	48	$10.11	43	$7.29	45	$16.89	50
No. 2	7.72	52	10.22	52	....	....	....	....
No. 3	13.87	35	11.92	44	9.97	46	16.79	44
No. 4	12.16	48	8.52	48	9.73	48	12.16	48
No. 5	10.09	52	6.46	53	8.28	56	11.27	53
No. 6	10.58	48	....	....	....	....	15.29	48
No. 7	10.80	45	4.83	44½	8.24	48	5.36	27
No. 8	12.16	50	7.29	50	....	....	....	....
No. 9	10.03	46	....	....	7.57	52	....	....
No. 10	12.77	53	10.70	53	14.11	53	....	....
No. 11	8.52	48	....	....	7.79	48	....	....
No. 12	9.73	51	4.87	51	7.79	51	7.79	51
Total	126.46	576	74.92	438	80.77	447	85.55	321
Averages	10.54	48	8.32	49	8.98	49½	12.22	46

The following table of wages covers the nonproductive help, and is based on net earnings. The methods of paying for setting and drawing ovens by the count dozen has been explained in previous reports from this office. At the present time many potteries are paying by the oven, believing that the gain supposed to accrue from crowding a kiln, which results from the count system, is more than counterbalanced by the excessive breakage. The weekly earnings, however, under the two systems vary but little.

TABLE NO. 10.—*Earnings of nonproductive labor in Staffordshire potteries.*

Description of employment.	Amount.	Description of employment.	Amount.
Bookkeeper ... per week	$12.16	Ware girls:	
Foremen ... do	10.22	Biscuit ... per kiln	$0.81
Office clerks ... do	7.79	Glost ... do	.81
Office boys ... do	2.43	Warehousemen ... per week	7.06
Teamsters:		Selectors ... do	5.36
1 horse ... do	5.84	Polishers ... do	7.30
2 horses ... do	7.30	Slip-makers ... do	8.27
Engineers ... do	8.76	Pug-mill men ... do	6.33
Odd men ... do	4.87	Dippers ... do	17.03
Oven firemen:		Dippers' help:	
Biscuit ... do	21.53	Women ... do	2.92
Glost ... do	15.20	Boys ... do	2.43
Decorating-kiln firemen ... per kiln	5.60	Night watchmen ... do	4.87
Head biscuit brusher ... do	1.21	Managers ... do	24.33
Head glost brusher ... do	1.21		

COST OF LIVING.

In table No. 9 I have shown the average earnings in each department, but when wages are measured by money the actual amount rises or falls according to the purchasing power of the same. Therefore, in comparing wages between different countries or localities the cost of living plays an important part. If one man works ten days to earn a suit of clothes and another man working for the same daily wages can procure a suit of equal value by laboring five days, the latter's wages, so far as that purchase is concerned, are actually double the former. If one man pays $8 rent per month and another receives equal accommodation for $4, again the latter's wages, so far as rent is concerned, are double.

As men must have shelter, I shall first consider rent. I know nothing of the rent paid in any of the pottery towns in the United States, and, therefore, shall make no comparison. I shall simply give the rents paid in Staffordshire, and those in the United States interested in the question can supply the figures for that side. Rent here, as everywhere, depends on location, size, conveniences, etc. Again, the sum paid depends on the taste of the lessee. One who cares to save no part of his earnings will occupy a much more expensive house than one who looks out for "a rainy day." Near all pottery works good five-room houses, with cellar and small back yard, can be rented for 85 cents to $1 per week. By going to the outskirts or to one of the villages bordering on the towns houses equally good, usually with gardens attached, can be rented for less money. In addition to the rent, he must pay certain rates. Taxes for local purposes are based on the rental value of the premises. An inspection of the collector's books shows that on houses of the grade under consideration the rates never exceed $9.43 per year. It is sometimes said that onerous stamp duties are levied on deeds, leases, bank checks, etc. Very few of these can fall on the workman. If he takes a lease of a house, it must be stamped; but he may live many years under the one lease. Potters usually secure a house or "rent contract" which requires no stamp. A stamp of 2 cents is required on each bank check, and he may draw two checks per month or not one a year. But these stamp duties are for Government expenses, and take the place of indirect taxes that the American workman is obliged to pay. The English workman pays no indirect taxes on necessaries, excepting tea and coffee. The English Government is supported largely by a tax on wealth, and the working people are therefore practically exempt. Taxes that fall exclusively on pleasure, such as those levied on guns, hunting privileges, etc., can be borne or not by the workingman as he sees fit.

The cost to furnish a house depends on the taste of the occupant. It is valueless to compare the prices of house furnishings and cooking utensils unless the articles under comparison are known to be exactly the same. The following tables show the articles and prices for each that a four-room house can be furnished with in Staffordshire, the total cost being $121.78.

SITTING ROOM.

Articles.	Cost.			
	£	s.	d.	
Mahogany loo table	1	5	6	$6.21
Four chairs, covered with American leather	2	10	0	12.16
Easy chair, covered to match	1	15	0	8.52
Couch, to match	2	9	6	12.04
Mahogany cheffonier	1	18	6	9.37
Chimney glass	0	9	6	2.31
Fender and set of fire irons	0	12	0	2.92
Square of carpet	0	19	6	4.74
Hearth rug	0	9	6	2.31
2 pairs of curtains	1	1	6	5.23
Total	13	10	6	65.81

BEST BEDROOM.

4-foot-6-inch French bedstead	0	19	6	4.74
4-foot-6-inch palliasse	0	8	6	2.07
4-foot-6-inch wool mattress	0	15	9	3.83
Wool bolster	0	3	6	.85
2 feather pillows	0	7	6	1.82
3-foot-6-inch painted chest of drawers	1	6	6	6.45
3-foot painted dressing table and washstand	0	13	0	3.16
Toilet glass	0	5	6	1.34
3 cane chairs	0	8	3	2.01
Towel rail	0	1	6	.36
Fender and set of fire irons	0	6	0	1.46
3 carpets, bedside	0	3	9	.91
Pair of curtains	0	7	6	1.83
Total	6	6	9	30.83

SECOND BEDROOM.

Articles,	Cost.			
	£	s.	d.	
4-foot-6-inch French bedstead	0	13	6	$3.28
4-foot-6-inch palliasse	0	8	6	2.07
4-foot-6-inch wool bed, bolster, and 2 pillows	0	16	6	4.02
Painted washstand and dressing table	0	11	0	2.68
Toilet glass	0	3	9	.91
Towel rail	0	1	6	.37
2 cane chairs	0	5	6	1.34
2 carpets, bedside	0	2	6	.61
Fender	0	2	0	.49
Pair of curtains	0	6	6	1.58
Total	3	11	3	17.35

KITCHEN.

3-foot-6-inch by 3-foot square table	0	10	6	2.55
4 Windsor chairs	0	14	0	3.41
Fender and fire irons	0	7	6	1.82
Total	1	12	0	7.79

I have examined this furniture and find it exactly as represented. A larger house can be fitted up in proportion. Of course, rooms can be substantially furnished with the same number of pieces for much less money. But the rooms referred to are such as any workman can well be proud of.

All kitchen utensils, cutlery, crockery, brushes, etc., quality for quality, are not more than half the price paid in the United States, and some articles still less.

CLOTHING.

The greatest advantage that the English workman enjoys over his American brother is in the line of clothing. Everyone knows that there is an infinite range of quality, so that it is idle to compare prices without producing the articles compared. For instance, one can buy a suit of clothes in the United States for $10, $15, or $20, and upwards, and the same prices can be paid here; but the question is, are the suits the same in quality? By no means. The English suit is worth double the one purchased in the United States. Again, a flannel shirt or woolen drawers can be bought in each country for $1 or $1.50, but the same rule applies as to quality. With a mass of samples sent me from the United States, I have carefully compared English cloths, both for men and women, made and unmade, and can state that in woolen goods of all kinds there is a saving of one-half in purchasing here. In cotton goods of the better grade there is a saving of at least 40 per cent on the American price. In linen goods, including tablecloths, napkins, handkerchiefs, etc., there is a saving of 30 to 60 per cent. Hats and caps are less that one-half the American cost. Gloves that cost $1.50 in New York can be bought here for 72 cents. A sample of silk costing $1.50 per yard in the United States, I find can be duplicated here for 90 cents.

For fuel, bituminous coal is exclusively used and costs $3 per ton. Illuminating gas costs 72 cents per 1,000 feet; kerosene oil, 12 cents per gallon.

FOOD SUPPLIES.

In food supplies I furnish the prices current in the retail shops. These prices are for products of medium and first-class quality. The cost of vegetables fluctuates according to the season; other prices vary but little from year to year.

Prices of food stuffs.

Articles.	Price.	Articles.	Price.
	Cents.		Cents.
Bread.......................per loaf of 4 pounds...	6 to 8	Bluing..................................per pound...	15
Flour.....................................per pound...	2	Candles..do......	8
Baking powders....................................do......	24	Salt.................................per 14 pounds...	6
Beef...do......	10 to 16	Pepper..............................per pound...	32
Mutton...do......	10 to 16	Currants..do......	3
Sheep's heads..................................each...	14	Raisins..do......	5
Sausage..............................per pound...	12 to 16	Cornstarch..do......	13
Pork...do......	10	Sugar (granulated)..........................do......	4½
Ham..do......	12	Cheese...do......	10 to 16
Bacon..do......	12	Eggs.................................per dozen...	18
Fish (cod, haddock, etc.)..................do......	7	Milk...................................per quart...	6
Herring..do......	3	Washing soda......................per pound...	0[illegible]
Butter, best...................................do......	26	Vinegar..............................per gallon...	16
Tea, fine quality..............................do......	36	Potatoes.............................per bushel...	36
Coffee...do......	35	Cabbage...............................per head...	2
Cocoa..do......	30	Carrots..................................per peck...	15
Lard...do......	12	Onions...do......	15
Soap...do......	04	Turnips..do......	9

In conclusion, I want to thank the manufacturers of this district for their uniform frankness in answering all questions bearing on this report, and especially for the free inspection of their books, which have invariably been opened to me.

WENDELL C. WARNER,
Consul.

TUNSTALL, *February 17, 1894.*

ARGENTINE TRADE—1892-'93.*

PERCENTAGE OF TRADE OF 1892 COMPARED WITH 1883.

The following table exhibits the percentage of Argentine commerce—imports, exports, and total trade—which was distributed to each country during 1892, compared with the percentage in 1883, a period of ten years:

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* Mr. Baker's full report, from which these extracts are made, appears in "Commercial Relations of the United States," 1893. Mr. Baker says he is not responsible for any errors of addition or computation that may appear in this report, as the figures are taken directly either from the official returns of the national statistical office or reports of cabinet officers.

Countries.	Imports.		Exports.		Total trade.	
	1883.	1892.	1883.	1892.	1883.	1892.
	Per cent.	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*	*Per cent.*
Germany	8.7	11.6	8	14.7	8.8	13.2
West Indies	0.1	....	1.9	1.1	1	1.5
Belgium	4.1	7.3	20.2	13	12.1	10.1
Bolivia	1.1	....	0.5	1.4	1.3	1.2
Brazil	2.7	2.3	2.8	9.2	2.7	5.7
Chile	1.3	....	3.3	1.8	1.8	1.9
Spain	4.7	2.4	2.2	2.1	3.4	2.3
United States	6.1	8.1	5.8	4.3	5.9	6.3
France	19.2	11.4	35	23.4	27.1	17.4
Italy	4.3	9.2	2.7	3.8	3.5	6.5
Holland	1.7	1.2	....	....	1.3	1.1
Paraguay	1.6	2.2	0.3	1.3	1.9	1.2
Great Britain	38.3	39.2	9.9	17.4	24.1	28.3
Uruguay	5.5	4.1	3.2	2.8	4.2	3.4
Not named	3.6	2	4.2	5.7	3.9	3.9
Total	100	100	100	100	100	100

These figures show that during the last ten years there has been no great relative change in the course of trade of the Argentine Republic. Great Britain, in the amount of imports, still exhibits her great preëminence, now furnishing nearly 40 per cent of the whole, while the exports to that country in the same time have nearly doubled. France has quite lost the second place in the matter of imports, but still occupies it at a reduced percentage in the exports from this country. Germany has increased her imports 3 per cent and now comes next after Great Britain, while in the matter of the exports sent to her she shows an increase of nearly 6 per cent. Belgium has somewhat increased her imports, but the exports sent to her have fallen off nearly 7 per cent. The United States, in the matter of imports, occupies the same relative position she did ten years ago; but in amount they have increased 2 per cent, while there was a slight falling off in her exports from the Argentine Republic. There are no great changes in the relative positions of the other countries.

As a matter of some interest to those of our merchants and manufacturers who are seeking new markets for their surplus, I proceed to examine the details of the trade of the more important countries with which the Argentine Republic has commercial relations, or at least those with which the United States more directly come into competition.

TRADE WITH GERMANY.

The development within the last ten years of the Argentine trade with Germany is especially worthy of attention. Its extent will appear from the following table:

Years.	Imports.	Exports.	Total trade.
1883	$7,028,051	$4,823,827	$11,851,878
1884	8,868,930	6,813,713	15,682,643
1885	7,226,999	8,512,443	15,775,442
1886	8,044,805	6,950,908	14,995,783
1887	12,108,456	9,835,754	21,944,210
1888	13,310,094	13,309,546	26,619,640
1889	15,477,754	17,120,472	32,598,226
1890	12,301,472	11,566,441	23,867,913
1891	6,206,572	11,621,898	17,828,470
1892	10,676,513	16,635,103	23,311,616

Although there was considerable reduction in the figures for 1891, it is seen that Germany has only very slightly felt the effects of the Argentine crisis. The principal items of import from that country for 1892 were as follows:

Articles.	Value.	Articles.	Value.
Rice	$416,423	Ready-made clothing	$345,396
Refined sugar	415,235	Malt	180,194
Starch	61,031	Printing paper	682,730
Codfish	73,132	Wire for fencing	1,161,921
Sackcloth	779,944	Sewing machines	71,331
Cassimeres	249,446	Hardware and machinery	371,143
Flannels	423,349	All other imports	4,213,093
Cotton fabrics	1,243,861	Total	10,676,531
Stockings	877,156		
Handkerchiefs	111,147		

The exports to Germany for 1892 were as follows:

Articles.	Value.	Articles.	Value.
Sheepskins	$379,637	Linseed	$221,390
Ox and cow hides:		Maize	393,254
Dry	174,890	Wheat	436,741
Salted	756,746	Nutria skins	253,539
Horsehides:		Tanning materials	6,620
Dry	132,404	Oil cakes	127,847
Salted	334,744	All other articles	429,951
Wool, unwashed	12,912,885	Total	16,635,103
Goatskins	74,455		

The total shipments of wool were 45,046 tons, against 28,530 in 1891; of wheat, 13,601 tons, against 11,503 tons in 1891; of maize, 20,506 tons, against 10,310 tons in 1891; and of linseed, 3,564 tons, against 1,238 tons in 1891.

TRADE WITH BELGIUM.

The trade of the Argentine Republic with Belgium has shown quite the same expansion as that with Germany. The returns for the last ten years are as follows:

Years.	Imports.	Exports.	Total trade.
1883	$3,261,077	$12,148,946	$15,410,023
1884	7,249,887	14,879,945	22,129,732
1885	7,463,893	14,883,506	22,347,399
1886	7,721,817	10,924,737	18,746,554
1887	10,947,935	12,111,531	23,059,486
1888	11,084,482	16,979,944	27,764,426
1889	13,958,247	16,326,423	30,284,670
1890	10,986,710	12,003,086	22,989,796
1891	6,374,868	18,130,717	24,505,655
1892	6,646,838	14,672,427	21,319,265

While the imports for the last two years have shown some contraction, owing to the crisis, the volume of trade has continued pretty steady.

The imports from Belgium for the year 1892 were as follows:

Articles.	Value.	Articles.	Value.
Rice	$147,576	Glass and glassware	$581,515
Refined sugar	218,679	Railway materials	92,574
Cotton fabrics	793,253	Agricultural machinery	102,850
Prints and calicoes	102,802	Starch	34,188
Other textiles	997,986	Paints	70,724
Ready-made clothing	84,481	All other imports	1,620,753
Printing and other paper	237,711	Total	6,646,838
Wire for fencing	739,926		
Iron and ironware	811,914		

The table of exports shows the following shipments for 1892:

Articles.	Value.	Articles.	Value.
Hair	$215,071	Linseed	$274,870
Ox and cow hides:		Maize	704,763
Dry	283,561	Wheat	2,350,713
Salted	1,365,826	Wheat extract	136,302
Wool, unwashed	8,360,839	Oil cake	115,240
Flour	113,616	All other exports	622,923
Goatskins	68,957	Total	14,672,427
Sheepskins	59,836		

The shipments of unwashed wool amounted to 29,289 tons, against 34,282 tons in 1891; of wheat, 73,804 tons, against 99,961 tons in 1891; of maize, 37,000 tons, against 14,017 tons in 1891; of flour, 2,073 tons, against 276 tons in 1891. There was but little change in the shipments of hides, hair, etc.

TRADE WITH FRANCE.

In its total volume the trade of the Argentine Republic with France is now exactly where it was ten years ago. The imports, however, show considerable reduction compared with the amounts during the flush times of 1887–'90. The falling off, of course, is explained by the crisis, a large part consisting of articles not of prime necessity, but of luxury, the demand for which ceases whenever there is a pinch in the money market. The course of trade since 1883 is as follows:

Years.	Imports.	Exports.	Total trade.
1883	$15,418,917	$21,041,495	$36,460,492
1884	16,785,590	22,518,371	39,303,961
1885	14,545,195	24,164,829	30,710,024
1886	17,002,038	22,342,183	39,344,221
1887	22,743,550	24,871,354	47,614,904
1888	22,966,857	27,973,561	50,914,418
1889	30,237,407	38,264,414	68,501,821
1890	19,875,877	26,683,318	46,559,195
1891	7,925,296	24,142,260	32,067,556
1892	10,425,865	26,438,097	36,863,962

The imports from France for 1892 consisted of the following articles:

Articles.	Value.	Articles.	Value.
Refined sugar	$2,013,831	Paper and paper goods	$177,825
Olive oil	164,816	Hardware	129,384
Wines	1,620,604	Bitters	245,168
Textile goods	2,413,891	Brandies	81,495
Clothing and manufactured goods	826,392	Confectionery, etc	178,527
Perfumery	123,105	Unenumerated articles	116,273
French leather	306,514	Total	10,425,865
Jewelry	285,877		
Fancy articles	1,742,145		

The imports of refined sugar amounted to 10,599 tons, against 6,962 tons in 1891; Bordeaux wines, to 15,363,808 liters, against 9,236,143 liters in 1891; cottons and calicoes, to 481,245 kilograms, against 913,602 kilograms in 1891.

The exports to France in 1892 were as follows:

Articles.	Value.	Articles.	Value.
Wool, unwashed	$16,257,884	Goatskins	$457,181
Sheepskins	6,615,583	Frozen mutton	94,658
Cowhides:		Flour	35,445
Dry	199,756	Grease and tallow	81,477
Salted	273,755	Dyewoods	116,755
Linseed	328,557	Silver minerals	85,396
Maize	606,481	Other exports	513,145
Wheat	499,391	Total	26,438,097
Oil cake	273,653		

The exports of wool were 56,858 tons in 1892, against 58,450 tons in 1891; of sheepskins, 22,053 tons, against 15,232 tons in 1891; of goatskins, 240 tons, against 260 tons in 1891; of maize, 32,056 tons, against 7,205 tons in 1891; of linseed, 5,759 tons, against 1,965 tons in 1891. There was no great change in exports of wheat or flour.

TRADE WITH GREAT BRITAIN.

The trade of Great Britain with the Argentine Republic, with all the fluctuations occasioned by the crisis and bad times, has during the last ten years continued to maintain its great supremacy. The imports are not so great as they were during the "boom" of three years ago, but the exports have shown a steady increase. The following are the figures:

Years.	Imports.	Exports.	Total trade.
1883	$30,695,963	$5,956,093	$36,652,056
1884	39,727,694	7,211,437	37,939,131
1885	35,375,628	12,816,341	48,191,909
1886	33,432,660	10,071,851	43,501,510
1887	34,579,210	17,085,001	51,864,220
1888	44,044,851	17,061,411	61,106,262
1889	56,820,169	14,931,394	71,571,563
1890	57,818,510	19,299,095	77,115,603
1891	28,312,410	16,798,212	45,110,612
1892	35,835,492	19,720,513	55,556,005

The imports from Great Britain for 1892 were as follows:

Articles.	Value.	Articles.	Value.
Breeding animals	$97,540	Materials for trains, telegraph, etc	$357,548
Tea	743,451	Tin sheets	92,521
Textile fabrics	18,139,273	Tin and copper manufactures	162,925
Ready-made clothing	1,102,521	Hydraulic cement	197,830
Drugs and chemicals	1,405,398	Unenumerated articles	2,099,634
Iron and ironware and machinery	4,033,102	Total	35,835,858
Coal	4,813,518		
Railway materials	2,639,831		

Included in textile fabrics were 9,104 tons of cottons, against 3,880 tons in 1891; and 2,604 tons of calicoes, against 1,424 tons in 1891. The agricultural implements and machinery amounted to $646,898. The receipts of stove coal were 481,352 tons, against 311,221 tons in 1891.

The exports to Great Britain for 1892 were as follows:

Articles.	Value.	Articles.	Value.
Live stock	$226,453	Linseed	$1,601,171
Frozen mutton	1,905,165	Maize	3,336,647
Sheepskins	514,046	Wheat	7,134,539
Cowhides:		Flour	73,346
Dry	154,358	Grease and tallow	281,840
Salted	879,315	Dyewoods	339,934
Wool, unwashed	1,110,478	Bran	141,255
Salted tongues	144,831	Other articles	1,510,385
Preserved meats	311,503	Total	19,720,513
Oil cake	115,257		

The shipments of linseed were 26,691 tons, against 3,464 tons in 1891; of maize, 173,289 tons, against 17,124 tons in 1891; of wheat, 226,854 tons, against 140,054 tons in 1891; and 23,815 tons of frozen sheep, against 21,188 tons in 1891.

TRADE WITH THE UNITED STATES.

Compared with the foregoing returns of the commerce of the Argentine Republic with the countries of Germany, Belgium, France, and Great Britain, from which the great bulk of the imports to the River Plate are received, the trade with the United States exhibits very small proportions. The following table shows the imports, exports, and total trade for the last twenty years:

Years.	Imports.	Exports.	Total trade.
1873	$5,167,616	$3,032,945	$8,200,561
1874	3,949,580	3,747,300	7,696,884
1875	3,069,354	3,055,205	6,124,599
1876	1,180,770	2,392,236	4,274,006
1877	2,249,320	2,415,486	4,664,806
1878	2,773,589	2,547,187	5,320,776
1879	3,921,379	3,917,676	7,839,055
1880	3,224,743	5,126,440	8,351,181
1881	4,268,110	4,035,714	8,323,824
1882	5,054,764	2,956,582	8,051,346
1883	4,933,054	3,510,574	8,443,628
1884	7,454,832	4,064,848	11,519,680
1885	7,006,719	5,563,841	12,570,560
1886	7,673,284	3,580,406	11,253,690
1887	11,044,553	5,938,808	16,943,361
1888	9,909,895	6,665,520	16,575,415
1889	16,801,750	7,726,691	24,528,441
1890	9,301,541	6,060,958	15,368,499
1891	3,445,904	4,214,502	7,660,406
1892	7,376,583	4,831,454	12,208,037

Although our trade has fallen back in the past few years, yet the returns of the last year show that it is gradually recovering.

The returns in detail of the imports from and exports to the United States for the year 1892 are given in the following tables:

Imports from the United States in 1892.

Articles.		Quantity.	Official value.
Olive oil	kilograms	38,823	$12,811
Lard	do	28,226	8,750
Leaf tobacco	do	6,436	3,366
Cordage for baling wool	do	97,064	17,471
Canvas	do	170,803	119,437
Lamp wicks	do	36,745	19,915
House lines	do	1,716,455	694,684
Cotton goods	do	119,391	93,242
Oils, various kinds		....	94,718
Spirits of turpentine	kilograms	251,341	32,674
Fireworks	do	15,650	5,478

Imports from the United States in 1892—Continued.

Articles.	Quantity.	Official value.
Specific for curing sheep scab		$32,604
Patent medicines		12,171
Rosin ... kilograms	3,980,862	99,521
Pharmaceutical products		10,514
Pine lumber ... square meters	6,683,846	2,788,521
Oak lumber ... do	11,360	9,088
Trunks and boxes ... number	3,800	402
Casks and barrels, empty ... do	23,063	42,391
Furniture		6,729
Other manufactured articles of wood		27,425
Books and pamphlets ... kilograms	23,051	23,051
Arms and munitions		13,516
Wire for fencing ... kilograms	144,114	10,113
Nails ... do	152,022	14,465
Tools and implements		24,565
Plows ... number	27,834	180,530
Rakes ... kilograms	40,286	13,310
Plowshares ... do	171,543	24,430
Reapers ... number	3,643	847,830
Thrashing machines ... do	21	14,930
Spades, shovels, and picks ... do	272,978	66,579
All other agricultural implements		53,632
Sewing machines ... number	751	10,640
All other machines		691,251
All other manufactures of iron		46,169
Materials for railroads		27,693
Lamps		18,991
Coal ... tons	23,781	237,813
Kerosene ... hectoliters	93,022	465,109
Other articles not otherwise classified		460,066
Total		7,376,583

Exports to the United States in 1892.

Articles.	Quantity.	Official value.
Hair, horse ... kilograms	583,619	$189,211
Skins:		
Goat ... do	342,422	188,394
Sheep ... do	76,701	23,011
Nutria ... do	18,222	18,973
Carpincho ... do	14,840	13,346
Hides, cattle:		
Dry ... number	1,133,948	2,540,679
Salted ... do	33,000	107,800
Wool, unwashed ... kilograms	5,226,381	1,538,313
Cedar logs ... cubic meters	22,316	17,853
Quebracho logs ... kilograms	50,000	1,000
Ostrich feathers ... do	25,747	30,055
Bones ... do	10,864,640	137,605
Other articles not otherwise classified		25,214
Total		4,831,454

Comparing the foregoing table of imports with that of 1891, when our shipments to the River Plate reached their lowest figures in ten years, the reaction which appears to have taken place in the leading lines of goods is quite marked. This will appear from the following table:

Articles of import.	1891.	1892.
Turpentine ... tons	233	251
Resin ... do	1,504	3,980
Lumber ... square meters	3,648,276	6,683,846
Duck ... kilograms	32,517	170,803
Binding and other twines ... do	444,126	1,716,455
Plows ... number	8,683	27,834
Horse rakes ... do	4,374	40,266
Reapers ... do	884	3,643
Spades, shovels, and picks ... do	105,790	272,978
Cotton goods ... kilograms	27,953	119,391
Kerosene ... hectoliters	79,668	93,022

There are, however, some lines of goods which have entirely or almost disappeared from the table of our imports, such as sugar, starch, furniture, tobacco, lard, etc. The explanation, as I am informed, is that the Argentine tariff on such articles is now so high that they can not be shipped here without a loss. Thus the tariff on lard, on furniture, and on tobacco is 60 per cent on the value, and on starch and sugar 9 cents per kilogram. These articles are now in great part produced in the country.

The exports from the Argentine Republic to the United States show an increase over the figures of 1891 of $838,594. While there is a slight falling off in the shipments of carpet wools, there is a considerable increase in the shipments of dry hides, hair, and bones, which more than makes up the difference. The following are the principal exports, compared with 1891:

Articles.	1891.	1892.
Ox and cow hides	$1,455,848	$2,540,679
Wool	1,618,722	1,538,313
Hair	140,700	189,211
Bones	55,486	137,605
Goatskins	296,085	188,394
Ostrich feathers	13,596	30,055

But for the two items of hides and wool, as will be seen, the exports from this country to the United States would be quite insignificant. In regard to the latter, the only wools which, owing to our high duties, it is possible to ship at a profit are the long, coarse, carpet wools of Cordoba. These are included in class 3 of the schedule; and, their value being 13 cents or less per pound, they are able to pay the duty of 32 per cent on the same. These wools have for many years been annually bought up by a syndicate of Massachusetts carpet manufacturers, who thus, instead of competing with each other, get the product at the lowest possible price and then distribute the clip, by some arrangement among themselves, upon its arrival in Boston. And now, as I am advised, a trust has also been formed in the United States, which includes about two-thirds of the leading tanning establishments, for buying the ox and cow hides of the Argentine Republic and other South

American countries. The trust is based on $60,000,000 of preferred stock, $60,000,000 of common stock, and $10,000,000 borrowed for running expenses on debentures of the trust. This, of course, will place the River Plate hide business in the hands of a single buyer and utterly prevent any competition in the market here, unless at any time a stray order should arrive from parties not included in the trust. The arrangement has just gone into operation, and already it has quite broken down prices of American hides, in view of which an attempt will be made to open a market for them in Europe.

WHY THE BULK OF ARGENTINE TRADE IS WITH EUROPE.

As we have seen, the share of the United States in all these figures of importation and exportation has been and continues to be a very small one. The bulk of the Argentine import trade has been from the beginning, and continues to be, with Great Britain, with France, Germany, and Belgium following after in the order named. The causes which have given those countries their supremacy are no mystery, but are patent to all careful observers; and they do not, to any great extent, depend upon any peculiarities of the trade which they have learned, nor do they result from any close study of the supposed wants and tastes of the people. Of course, wants, tastes, and peculiarities are consulted, where they exist, but these are not the prime reasons which have secured to them, in great part, the control of the Argentine trade.

Great Britain.—In the case of Great Britain, which quite monopolizes the imports, we have to go back for the causes to the beginning of the Argentine Republic. The people of that Kingdom, immediately after the Argentine war of independence, seeking new homes for themselves and new outlets for their manufactures—at a time, indeed, when we may be said to have had no manufactures—came in trading colonies to the River Plate and became part and parcel of the country. The basis of the first English settlements here were the armies of Gens. Whitlock and Beresford, which in 1807, after the surrender of the one and the defeat of the other, were so scattered through the interior that but few of the rank and file ever got home again, but married and settled in the country, some engaging in sheep farming and some in trade. As the treaty of commerce with Great Britain conceded to her subjects almost unrestricted trading rights and privileges, with full protection for their lives, their stock, and their merchandise, with exemption from forced loans and exactions, others from that nation immediately followed, some of them men of wealth and position.

These newcomers purchased landed properties, and many of them became sheep farmers, the Scotch and the Irish being the pioneers in that industry, which has now grown to such vast proportions; or they engaged in the foreign trade, and thus at once fixed and expanded the commerce between Great Britain and the Argentine Republic, some of the English houses now doing business in the River Plate having been founded upwards of a century ago. They saw their opportunities, and they have made such good use of them that that Kingdom now has the control of the Argentine trade. The English, Scotch, and Irish settlers, and their descendants in this part of South America are numbered by tens of thousands. Over and above their mere commerce, with its gigantic proportions, there is now invested all over the Argentine Republic an immense amount of British capital in *estancia* and other lands, in cattle and sheep farming, in manufactures, in mining, in river steamers, in railways, in tramways, in public works, in gas companies, in banking institutions, etc. Thus, with their numerous mercantile establishments in this city and Rosario, and the many lines of steamships between the ports of Great Britain and the River Plate, nothing is lacking to assist, dispatch, and indefinitely augment the commerce which they now so completely control, or strengthen the foothold which they already possess in the country. More than this, the British people have other large amounts invested in the securities of the nation; and their commercial, financial, and business relations are not only an established fact, but they could hardly be more intimate or more complete. They are the bankers, brokers, and creditors of the Argentine Republic.

France.—Though the trade relations of France with the Argentine Republic are not so complete, they are quite as significant as those of Great Britain. At the same time the social intercourse of the two nations is even more friendly and close. The Argentines, when they travel, go to Paris, and the French, in return, furnish this country with its fashions—of course, supplying whatever enters into the fashion account. Thus, there is now a French colony here in Buenos Ayres of over 20,000 people, all engaged in trade or business of some kind, and French trade greatly profits by the fact that a large proportion of the dry-goods merchants of Buenos Ayres are French or have connection with Paris houses, that the *modistes* here are principally French, that the shoe shops are French, that the furnishing shops are French, that the tailors are French, that the hatters are French—since orders in all these trades and lines of goods are, in great part, sent directly to Paris. In addition to this, the Argentines drink French wines and brandies and eat French preparations of food, preserves, confectionery, etc., while the ten thousand different articles of fancy, vertu, and art, which the French know so well how to make attractive, and which so pander to wealth and fashion, have no difficulty in finding a sale here and adding to the imports. But the French trade within the last few years has taken a wider range, and now French experts make annual visits to the River Plate to buy up the wool clip, the quantities of that staple which go forward to Dunkirk for a market increasing every year in amount. In the financial line, also, the French have made some ventures, and it is understood that a good many millions of Argentine bonds and other securities are now held in Paris. Thus, with a French-Argentine bank in this city to facilitate exchanges, and two or three lines of steamships plying between the ports of France and the River Plate, it is not surprising that the trade relations of the two countries are reciprocally satisfactory.

Germany and Belgium.—Both of these countries have a well-defined trade with the Argentine Republic, not commanding in the amount of imports, but reliable, and with a tendency to further development. It is only within the last few years that the Germans commenced operations here on any considerable scale; but they are the most persevering and painstaking merchants in the world; and that they have come here "to stay" is evident from the manner of their business and the methods they have adopted to push it. They have in the country run their distinctive houses with full supplies of trained business men, all of whom speak Spanish and English as fluently as their native tongue. They have established, also, at least two lines of steamships with the River Plate, and have an Argentine-German bank in successful operation. From very small figures the German import trade is beginning to assume considerable proportions. The fact that the Germans engaged in business here now number, with their families, 15,000 or 20,000 people, who, in their social relations, thoroughly affiliate with the Argentines, confirms the commercial progress they are making. As they fully understand the trade and take a national pride in pushing German goods to the exclusion, where it is possible, of those of other countries, the auguries are all in their favor. What strengthens their position is the increasing export business which they are doing, Argentine wools now finding quite a demand in German markets. Belgium was formerly the great entrepôt of the wools of the River Plate, the auction sales at Antwerp distributing the products to the different countries of the Continent. This trade is now divided with Dunkirk, but the old-time trade relations of the Argentine Republic with Belgium are still to be seen in the long lines of manufactured goods which continue to be imported from that country. Though the Belgian colony in Buenos Ayres is not so large as the German, it embraces some of the strongest and best-known commercial houses, which have direct business connections with manufacturing establishments at home.

HOW THE UNITED STATES ARE HANDICAPPED.

Under these circumstances, is it surprising that the United States have such a limited commerce with the Argentine Republic? With the facilities of trade which the nations of Europe generally offer to this country, with the close intercommunication by steamships which exists, with the banking advantages which they enjoy, with their established business houses here, with the interchange of liberal credits which are so essential to trade, how is it possible for us, who are possessed of none of these facilities, to compete with them for the Argentine trade; even though our goods be really of better quality and though they would at the same prices be preferred by the people of the River Plate? The wonder is, not that the United States finds difficulty in extending its trade relations with the River Plate, but that it can find any foothold here at all. With the field already occupied by nations which not only have a large reciprocal trade, but are connected with this country by a thousand different business affinities and social ties, we have little reason, with our almost total lack of modern trade methods, to expect a very large share of Argentine commerce. Our commerce with this country at present consists not of a regular, certain, diversified trade; but, in great part, of such raw materials of prime necessity as can not be obtained elsewhere. If we eliminate from our imports to the Argentine Republic the cargoes of timber, of kerosene, and of agricultural implements and machinery, it will be seen that what remains is a very small item, so far as dollars and cents are concerned. The truth is that, socially and commercially, we are strangers to the Argentine people. There are not a hundred citizens of the United States in the entire country; and of these not twenty-five are engaged in American commercial business, and only one or two in the importation of American manufactured goods. It can scarcely be said that, in the ordinary lines of manufactured merchandise, there are any American houses on the River Plate. The business of importing goods from the United States is all in the hands of foreign houses—English, French, and German. It may be safely inferred from this fact that no orders, in the ordinary course of trade, are ever sent to the United States if the same goods can be obtained from their European correspondents, and, other things being equal, they prefer to buy from the latter, if they can, for the reason that it is more convenient and more expeditious.

ARGENTINE METHODS WITH THE UNITED STATES.

The method usually employed by Argentine houses in doing business with the United States is very simple and very satisfactory to them. They have their established correspondents in New York; and all their orders for American merchandise are sent directly to them, who make the purchases and ship the goods. In each case the Buenos Ayres house states exactly what it wants, and if there is required any special modifications in style, finish, or get-up, these are left to their correspondents to attend to. The American manufacturers of agricultural machinery generally employ established houses of this country as their agents, and ship to them directly or through their New York correspondents, as may be arranged or mutually agreed upon. In some few cases representatives of American houses or manufacturers are sent down here, not to sell by sample, but to offer and arrange terms with well-established houses for particular lines of goods or specialties; and such goods are sent out to them as agents, in stock for sale and disposition. This manner of making trade, though very much like "playing second fiddle," in some instances has proved quite satisfactory. It fails, however, to place American manufactures upon the same basis as those especially ordered and purchased by them. Selling by sample or orders for goods to arrive is no longer very greatly in vogue, as it has a tendency to lead to complications, misunderstandings, dissatisfaction, and in some cases to downright loss. In the matter of lumber and kerosene, there are several American merchants here who make a specialty of such shipments, though the bulk of the trade is done through foreign houses.

"PECULIARITIES" OF ARGENTINE TRADE.

In this connection, I may state that I am constantly written to by American manufacturers and merchants who are seeking in the River Plate an outlet for their surplus, to inform them of the "peculiarities" of Argentine trade; of the styles, fashions, and get-up of articles required by the Argentine market in order to secure a foothold here for them. Except as I have already suggested, I have to reply that the import trade of this country requires no particular study of the wishes and tastes of the people. No special experience or familiarity with the Argentine domestic market is necessary, for the reason that it no longer possesses any marked peculiarities. There was a time, in the days of Argentine provincialism, when such matters had to be studied, provided for, and complied with; when the Argentine people, especially those of the interior, were, perhaps, peculiar in some of their styles and fashions; and it would have been fatal to importers not to understand and humor them. All this was in the primitive times, when, for want of tailors, the "quanchos" of the pampas wore breechcloths instead of pantaloons and "ponchos" instead of boots, and the English manufacturers, in compliance with the fashion, proceeded to manufacture and send out to this market shiploads of such articles in colors even more decided than the native manufacturer could produce, and at prices three or four times cheaper. Some little of all this, in the far interior, yet remains; but it is fast disappearing, and there are now few markets in the world which are more "cosmopolitan" than that of the River Plate. With the accession, in late years, of a large and varied foreign population from all the countries of Christendom, with a close intercommunication by steamships with all the maritime nations of Europe, with a network of railways connecting the farthest points of the Republic with the commercial entrepôt of Buenos Ayres, the days of early Argentine styles and fashions have pretty much passed away. With Englishmen, Germans, Swedes, Austrians, and Norwegians in close contact with Danes, Belgians, Frenchmen, Spaniards, and Italians, and all these nationalities mingling and intermingling with the Argentines, the latter naturally have in great part laid aside their "ponchos," "chiripas," "poteo boots," and "alpaca sombreros," and now, with the rest of us, take great pride in coats, trousers, shoes, and hats of modern styles. It may be said, generally, that whatever is worn by man, woman, or child in New York, or Berlin, or London, or Paris, is likewise worn here in Buenos Ayres; and it is no longer much of a question which one of those centers of nineteenth-century civilization has furnished the outfits. It is Paris, however, which sets the fashions for the Argentines. An observing and much-traveled gentleman, who arrived here last week from the United States via England, informs me, as a striking illustration of the manner in which in recent years the styles and fashions of the world have become uniform, that the crowds he saw swaying down Broadway, New York, and through Regent street, London, in general dress and outward appearance are just like those which are to be seen every day in Calle Florida, Buenos Ayres.

What I have said in reference to dress and personal adornment is equally true in reference to manufactures generally. The same styles, peculiarities, and make-up which now would command the markets of Great Britain or the United States will be found in nearly every detail to be suitable also for the tastes and conditions of this part of South America. Unless merchants or consumers are seeking specialties, they raise no point as to the country from which manufactured articles are received or the particular patterns which they display. It may be said generally that a good article in any line of goods or manufactures, if in other respects it meets the wants or the necessities of the occasion, will, at the same price, hardly fail to command a sale in the retail markets of the Argentine Republic. So that the great and important task with our American manufacturers is to arrange with importing houses here to take what they have to offer. It is unfortunate that there are no American importing houses here to place their goods for them.

INVOICE PRICES OF MERCHANDISE.

Another point about which I am solicited by American manufacturers to give information is the invoice price of the different classes of merchandise shipped here from Europe and the cost of transportation. Such a thing as this, if not morally impossible, is at least quite impracticable. No Argentine importing house—and many of them are connected with or are branches of manufacturing establishments in Europe—would on general business principles be willing to reveal to outsiders the secrets of its invoice books, especially when the object of the information was to assist mercantile houses in the United States to undermine its business or compete with it to better advantage in its special lines of imports. Our Government has given strict instructions that its consuls abroad shall not reveal to anyone the invoice prices which exporters to the United States pay for their goods; and it is hardly to be supposed that it would expect them to seek such information in the case of other nationalities shipping to the Argentine Republic.

But the increase of our trade with the Argentine Republic does not hinge or depend on such expedients as these. Merchants and manufacturers in the United States desiring to do business with the Argentine Republic are not likely to depend on consular reports for prices or details of business operations, however much in other respects they may be assisted by them. They will either open correspondence with Argentine houses or send their agents here, and by these means place before the merchants of this country such information in regard to prices, credits, shipments, etc., as will show them exactly what they can do; and they will in return learn all that is necessary to be known by their principals in regard to styles, make-up, packing, and other details of the market for each particular class of goods they manufacture or have to sell. They will thus at once learn if they can put down their merchandise here as cheaply and on as satisfactory terms as the European shippers.

HOW AMERICAN TRADE MAY BE INCREASED.

Even this, however, does not go to the "bottom" of the question of an increase of our trade relations with the Argentine Republic. It is not by these means alone, if at all, that we can expect to divide the Argentine trade more equally with the commercial nations of Europe. They already have too much the advantage of us for us to gain much by such expedients. During all the years since the Argentine Republic became a nation they have been, consciously or unconsciously, preparing to monopolize its trade. They have established and have now in operation all the facilities and appliances for doing so.

(1) They have their numberless lines of steamships running to and from the River Plate. There is scarcely a day in the week that a steamer from some European port does not arrive at Buenos Ayres, and thus the receipt of merchandise can be counted on here to a day. The stimulus and impetus which these constantly arriving and departing steamships give to trade is incalculable. In this age of the world sailing vessels are no longer employed except for the heaviest freights, such as coal, lumber, salt, crude sugar, wines, kerosene, or heavy machinery. Everything in the hardware, the grocery, or the dry-goods lines intended for the Buenos Ayres market now comes by steamers, and the merchant who gives his order by cable to his agent in a European port knows that it will be filled and delivered here within twenty-five or thirty days.

(2) The advantage which steam communication gives to European manufacturers and wholesale houses in their trade with the River Plate is supplemented and enhanced by the fac that the mercantile firms in the importing business here are, as a general thing, branches of established houses or manufacturing companies in the business centers of the Old World, or they are their sole and immediate agents, and by a long course of trade now have their confidence and their business. They are thus enabled to obtain their goods at times and in quantities to suit their requirements, accompanied by the most favorable terms and credits.

(3) Another and most decided advantage which Europe enjoys is its extended banking and exchange facilities with the River Plate. The value of these in the general conduct of trade can hardly be overestimated. The business of exchange, collecting, remitting, and furnishing the needs of trade is a most important element in the details of reciprocal commerce, and in its way contributes quite as much to its success as rapid and reliable transportation. Here in Buenos Ayres Great Britain has five banks, France has one, Italy has two, Spain has one, Germany has one, Brazil has one—all doing a general business in discounting bills, making loans, attending to collections, receiving deposits, issuing bills of exchange, giving letters of credit, transferring funds, receiving goods on bills of lading, etc.

By these sure methods have the leading nations of Europe laid the foundations of a fixed and permanent trade with the Argentine Republic. They are prepared to handle its foreign commerce with certainty and dispatch, and at the same time with a profit to all through whose hands it passes. This has been considered by them as a matter of more importance than mere panegyrics on the excellence or superiority of what they may have to sell; for they argued, and argued correctly, that if the people of another nation have a demand for any particular article of merchandise or manufacture they will buy it—even though it may be perhaps inferior—where they can procure it with the greatest facility and receive it in the quickest time.

It would be well if in these respects the United States could follow the example thus set them. Until we do, our commercial relations with the River Plate must remain, in a great measure, as they are. In all the years that we have been striving for the trade of the River Plate we have made but little provision for obtaining it. Until we do, we will merely continue to send down here only such articles as can not be procured elsewhere. We can not expect to come into a large business with this country by finding out the invoice prices of goods shipped from Europe and thinking to duplicate them. We should have close and frequent intercommunication with the Argentine Republic by means of regular lines of steamers; we should have distinctive American business houses in Buenos Ayres; we should have more satisfactory banking facilities; and, with all, we should give the Argentine Republic a less restricted market for its products in return for our own.

STEAM COMMUNICATION WITH THE UNITED STATES.

The people of the River Plate have so often been promised (and have so often had the promise fail) a steamship line under the flag of the United States that they have pretty much lost all expectations of the accomplishment of such an enterprise. A year ago they were rejoicing in the arrival of a steamship or two belonging to the New York and Brazilian line direct from New York, but the subsequent failure of the company put an end to its good intentions. Since then Messrs. John Norton & Sons, of New York, well-known South American shippers, have had the enterprise to organize a line of chartered steamers under the British flag, which have been making monthly voyages from New York. A company owning the "Prince line" has also been sending steamers down here during the last few months and more recently steamers of the Lamport & Holt Liverpool Company have been making trips from New York to this port. If any or all these lines can be kept up and will make return voyages, with provision for passengers, to the United States, we shall no longer have reason for complaint, even though they may not be under our flag. What the trade needs and requires, however, is a feeling of assurance and reliance that this communication is not a mere temporary expedient, but that it will be permanent and regular. With this accomplished, perhaps the other prerequisites to the increase of American trade with the Argentine Republic may follow in time.

TRADE RETURNS FOR 1893.

The trade returns of the Argentine Republic for the first nine months of 1893 have just been published, and very satisfactorily supplement the opinion I have already given, that with the return of commercial confidence the business of the country is decidedly improving. The first three quarters of this year, compared with those of 1892, give the following result:

Description.	1892.	1893.
Imports for nine months	$68,710,051	$73,945,598
Exports for nine months	72,770,048	73,711,222
Total	141,480,099	147,656,820

Imports and exports of Argentine Republic for first three months of 1893.

Countries.	Imports.	Exports.
Germany	$8,537,120	$8,209,797
West Indies		692,315
Belgium	7,261,694	8,932,743
Bolivia	58,514	322,842
Brazil	1,564,237	10,632,417
Chile	289,728	1,355,687
Spain	1,980,317	1,720,291
United States	5,398,991	2,437,392
France	9,388,288	13,152,680
Italy	7,121,207	2,469,888
Holland	132,569	65,440
Paraguay	822,948	244,948
Portugal	38,323	955,745
Great Britain	24,681,516	15,164,342
Norway and Sweden	4,975	
Uruguay	2,038,470	3,426,011
Countries not named	1,792,634	3,655,465
Total	71,078,531	73,497,003

IMPORTS FOR NINE MONTHS OF 1893.

The amount of imports in each branch of trade for the first nine months of 1893, compared with the same period of 1892, is given in the following table:

Articles.	1892.	1893.
Live stock	$360,790	$143,702
Alimentary articles	9,608,067	7,776,709
Liquors	4,369,891	5,887,237
Tobaccos	264,294	305,507
Textile fabrics	20,148,138	21,500,518
Ready-made clothing	2,812,141	3,863,930
Drugs and chemicals	2,537,733	2,963,040
Lumber and its applications	2,518,521	3,587,473
Paper and its applications	1,807,490	2,401,714
Leather and its applications	447,038	674,362
Iron and its applications	5,866,119	8,421,320
Railway and other materials	2,904,649	2,678,901
Various metals and their applications	684,585	1,137,374
Glass and stone ware, etc	1,131,796	1,712,463
Combustibles, kerosene, etc	4,737,112	5,175,909
Various manufactured articles	2,173,708	2,843,372
Total	62,372,072	71,078,531
Imports of gold	6,337,979	2,867,067
Total	68,710,051	73,945,598

EXPORTS FOR NINE MONTHS OF 1893.

The following table gives the exports in each branch of industry for the first nine months of 1893, compared with those for the same period of 1892:

Articles.	1892.	1893.
Pastoral products	$42,073,751	$38,936,892
Agricultural products	21,015,289	25,898,584
Industrial products	4,266,976	4,016,127
Products of the forests	694,354	1,910,577
Products of the mines	543,789	261,582
Products of the chase	305,395	672,189
Animal and vegetable sundries	1,321,634	1,084,026
Various articles	627,255	717,026
Total	70,848,443	73,497,003
Exports of gold	1,921,605	214,219
Total	72,770,048	73,711,222

These returns, both of imports and exports, are full of encouragement to the country. The increase of exports, which continue to be in excess of the imports, shows that the balance of trade still remains on the right side of the commercial ledger. One of the most encouraging items of the above table of exports is the steady increase which agricultural products continue to exhibit. The decrease in the pastoral exports is only apparent, owing to the fact that the wool clip, which is believed to be larger than usual, had not at the end of September been shipped from the country. It will swell the aggregate returns for the year.

THE PREMIUM ON GOLD.

In November, 1891, the value of the Argentine gold dollar was $3.75 in paper; in November, 1892, it was $2.80 in paper, and now, while I write, it is $3.27 in paper—that is to say, the dollar in paper currency is now worth not quite 31 cents in gold. As a matter of some interest in a commercial point of view, I give from the Buenos Ayres Standard the following résumé showing the price in paper currency of $100 in gold since the beginning of the present year, as also the previous years:

Months.	Highest.	Lowest.	Average.
January	$318	$290	$301
February	328	309	317
March	324	306	314
April	315	301	306
May	319	305	314
June	347	320	327
July	343	323	333
August	358	336	345
September	362	346	352
October	344	314	328
November	329	315	324

The lowest quotation since the beginning of the year was $290, on January 11; the highest, $362, on September 25. The value of the paper dollar in January averaged 16*d.*, and in September 13⅛*d.*

The average quotations of the above months in 1891, 1892, and 1893 ran thus:

Months.	1891.	1892.	1893.
January	$319	$380	$301
February	336	365	317
March	351	346	314
April	347	341	306
May	379	330	314
June	383	317	327
July	379	323	333
August	398	326	345
September	403	327	352
October	437	318	328
November	372	289	324

The average quotations for the quarters ending February 28, May 31, August 31, and November 30, in the last three years, were:

Quarters.	1891.	1892.	1893.
February 28	$322	$373	$300
May 31	359	339	311
August 31	387	322	335
November 30	404	311	335

This seems to show that the seasons have little or no marked effect on the price of gold. In 1892 the premium was highest in the early months of the year, and in 1893 it was the lowest at the same period.

We may close this table by giving the highest, lowest, and average quotations of 100 gold dollars in the nine years that have elapsed since the suspension of specie payments, viz:

Years.	Highest.	Lowest.	Average.
1885	$165	$113	$137
1886	160	110	139
1887	153	120	135
1888	160	137	148
1889	242	148	180
1890	326	211	257
1891	461	301	373
1892	389	265	329
1893	362	290	324

The highest quotation was in October, 1891, when the paper dollar fell to almost 10*d.* (10.3) of English money.

The returns of trade for the last nine months imply, perhaps, more than they actually show. The business of the year, so far as this port is concerned, has been reasonably fair. But for the interruptions caused by political movements and the frequent uprisings in the interior, the year would have been a good one. It is probably this fact which tends to keep up the high premium on gold.

THE GENERAL OUTLOOK OF TRADE.

In regard to the outlook of trade, opinions are conflicting and contradictory. Some believe that the political peace of the country is now assured, and that business in the coming year will be much more buoyant; while others take a pessimistic view of the situation and say that if the state of siege were removed the political elements would again be in a revolutionary ferment. But for this uncertainty the effects of the crisis on the business of the country would scarcely now be appreciable. There have been no important failures during the last year, and some mercantile houses that asked for extensions when the crisis was at its worst are once more able to meet their current engagements. There are others, however, who, though they have thus far managed to stem the tide, are quite exhausted by the effort, and they may be compelled to succumb to the inevitable. But for all this there is an increasing activity in industrial pursuits, and the interior, now that the railways are once more in full operation, is sending forward its supplies of wool, hides, and cereals. The streets of Buenos Ayres are once more assuming a busy appearance; bolsa transactions are more confident, and the banks are discounting more freely. Altogether it would seem, so far as the people are concerned, that the beginning of the new year will be the beginning of better hopes and better business for the country. An immense amount of rubbish in the line of defunct and bankrupt joint-stock companies has been cleared away in the last twelve months, to the general satisfaction of the unfortunate shareholders, and their next investment will be made on a different basis. Even real estate, which since the crisis has been a drug in the market, is once more looking up, and not merely city but "camp" property is beginning to find buyers at good prices.

E. L. BAKER,
*Consul.**

BUENOS AYRES, *December 30, 1893.*

AMERICAN BREADSTUFFS AND THE RUSSO-GERMAN COMMERCIAL TREATY.

The pending treaty of commerce between Germany and Russia was signed by the commissioners representing both governments and published on the 10th of February. Although it has yet to be debated and ratified by the German Parliament, the attitude of the Imperial Government and the popular expression of commercial sentiment are so strongly in its favor that its adoption in substantially its published form would seem so probable that it may be interesting to inquire what effect the new conditions are likely to have upon the future export of American products, and notably breadstuffs, to Germany.

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* Reference is made to the following previous reports of Consul Baker on the condition of the Argentine Republic: No. 124, pp. 37-85, January, 1891; No. 13~~7~~8, pp. 385-454, March, 1892; No. 151, pp. 481-562, April, 1893.

The present situation has been repeatedly described in previous reports of this series, but for convenience of deduction the rates of duty on imported breadstuffs may be concisely restated.

Previous to February 1, 1892, German imports of American and Russian wheat and rye were subject to the same general rates of duty—$1.19 per 100 kilograms, or $11.90 per metric ton of 2,240 pounds. The duty on flour of wheat or rye from both countries was $2.50 per 100 kilograms, or $25 per ton.

But on the date just named the United States were placed by treaty with Germany in the class of most-favored nations, so that thenceforward the duties on American wheat and rye were reduced to $8.33 and on flour to $17.30 per ton. Meanwhile similar imports from Russia continued to pay the general or standard duties as above stated until the 1st of August, 1893, when, in consequence of disagreements between the two governments, the rates of duty on all imports from Russia into Germany were summarily raised 50 per cent and became, respectively, $17.85 per ton on wheat and rye and $37.50 per ton on flour. Since August last there have been in force, therefore, three rates of duty on wheat and flour imports to this country, viz, the minimum rate accorded to most-favored nations, the standard rate applicable to breadstuffs from countries which enjoy no special treaty privileges, and finally the retaliatory maximum rate applicable to imports of Russian origin.

The new commercial treaty between Germany and Russia sweeps away all these discriminations, secures to imports from Russia the minimum tariff conceded to most-favored nations, and thus puts that country upon an equal footing with the United States in all that relates to their freedom of access to the markets of Germany. The effects of these changed conditions when applied to the whole list of imports are too remote and wide reaching to be yet estimated; but in respect to breadstuffs, the most important item of competition, there are certain results which may be already foreseen. The basis for such a study is the record of German imports of wheat and rye during the past twenty-one years, a period which extends several years beyond the first enactment of grain duties in 1879 and includes the several changes and amendments to which those duties have been subject. The table following shows the total imports, in metric tons, of wheat and rye during each year since 1872, the average price in dollars per ton of each kind of grain in the Berlin market, and the various changes which have been made in the grain duties during the entire period.

A glance at these statistics will reveal several highly interesting facts: First, that there is in Germany, even during the years of most abundant harvests, a large deficit in breadstuffs which has to be filled by importation; second, that this deficit, although modified by various fluctuating influences, is, on the whole, increasing in close proportion to the growth of population; third, that the highest market values of wheat and rye at Berlin were in 1873, when both grains were imported free of duty, and the lowest values have been touched during the past year, when the highest duties were in force, so that the duties enacted at the demand of the agricultural class for the purpose of keeping up local values have failed to accomplish that result, for the obvious reason that the values of breadstuffs are governed in Germany, as elsewhere, by the world's grain market, and not by local conditions; fourth, that the highest total import—2,835,000 tons—was reached in 1879, the first year of the duty on wheat and rye, while the lowest was in 1886, when prices of both grains were considerably lower than in 1879; and, finally, that, contrary to the rule of twenty years ago, the imports of wheat now far exceed in volume those of rye.

Year.	Total imports.		Average price per ton in Berlin.		Duty rate.
	Wheat.	Rye.	Wheat.	Rye.	
	Tons.	*Tons.*			
1873	366,000	780,000	$62.83	$45.69	Free.
1874	408,000	950,000	57.12	47.12	Do.
1875	499,000	700,000	46.64	39.50	Do.
1876	685,000	1,100,000	49.98	41.41	Do.
1877	940,000	1,190,000	54.74	42.12	Do.
1878	1,060,000	945,000	48.07	34.03	Do.
1879	915,000	1,470,000	49.26	34.51	$2.38 per ton.
1880	227,600	689,600	54.02	46.41	Do.
1881	361,900	575,500	54.74	48.55	Do.
1882	687,200	658,300	51.64	38.79	Do.
1883	641,900	777,000	45.93	35.93	Do.
1884	754,500	961,600	41.88	35.70	Do.
1885	752,400	769,700	39.93	34.74	$7.14 per ton.
1886	273,300	565,300	39.50	32.13	Do.
1887	547,300	638,500	40.69	30.22	$11.90 per ton.
1888	339,800	652,800	42.84	32.60	Do.
1889	516,900	1,059,700	44.77	36.65	Do.
1890	887,952	876,200	46.88	39.98	Do.
1891	896,836	842,700	53.78	49.26	$8.33 and $11.90 per ton.
1892	1,271,951	548,600	45.22	39.50	Do.
1893	703,453	227,577	36.17	31.89	$8.33, $11.90, and $17.85 per ton.

The principal opposition which the pending treaty with Russia has encountered in Germany has come from the agricultural classes, who assert that its adoption will be the final blow to the grain-growing interest in this country, and that, with the gates open to all principal grain-exporting countries at uniform and moderate rates of duty, the German farmers, with their high-priced land that must be constantly fertilized to remain productive, will no longer be able to maintain the competition. However this may be, the fact seems obvious that under any conditions that are likely to prevail Germany will continue to need a large annual supply of imported cereals, and that these will continue to be furnished by the countries which have the most ready communications with Bremen, Hamburg, and Rotterdam and which are able to produce and deliver wheat and rye most cheaply in the German markets. The interesting question is, where will the United States stand in this competition with Russia as an equally favored rival and with India, Uruguay, and the Argentine Republic steadily increasing their area of wheat culture and their surplus production? The imports of the year just ended, when the prices of wheat and rye have touched the lowest figures known during the present generation, have a pertinent interest in this connection.

Imports from—	Wheat.	Rye.	Flour.
	Tons.	*Tons.*	*Tons.*
Belgium	6,761	6,243	440
Bulgaria	17,975	18,968	
Denmark	1,206	356	
Great Britain	152		
France		5,715	
Netherlands	1,742	2,634	
Austria-Hungary	23,783	383	21,252
Roumania	143,577	52,740	
Russia	21,636	99,235	437
Servia	5,848	2,375	80
Turkey	3,407	19,374	
British India	2,716		
Portugal		158	
Argentine Republic	151,396		
British America	3,226	215	
Chile	3,548		
United States	314,928	18,194	4,196
Other countries	2,353	1,124	489
Total	703,453	227,577	26,894

During the past year, therefore, with Russia crippled during five months by an all but prohibitory tariff, the United States furnished nearly one-half of all the wheat, about one-twelfth of the rye, and about one-sixth of the flour imported to Germany from all countries.

The practical question is, how serious will be the competition of Russia in these and other staple products should the pending treaty restore her to commercial advantages equal to those of the United States? Russia will, from the day that the new treaty takes effect, resume her old position as the source of supply of nine-tenths of the foreign rye used by Germany. The same will be true, in a greater or less degree, of raw flax, certain kinds of lumber and timber, lubricating oils, barley, flaxseed, and a number of animal and mineral products, in all of which the fields, forests, and mines of Russia supplement naturally and irresistibly the manufactures of Germany. Rye is the principal bread material for the Russian as well as the German peasant, and in the production of that cereal Russia need fear no competition.

With regard to wheat, the problem is much more complicated, for the reason, among others, that not only Russia, but India, Australia, the Argentine Republic, and Uruguay will have to be taken into account. To raise and deliver a bushel of wheat in the United States costs, according to official estimates, about 50 cents. In India the cost per bushel is stated to be 35 cents, and the danger from that quarter is measured only by the limit to which the area of culture can be extended. In South America this point is not known to have been accurately determined, nor are the statistics of wheat export from Chile, Uruguay, and the Argentine Republic generally accepted as trustworthy. But enough is known to warrant the belief that the wheat crop of India and South America is nearly, if not quite, equal to that of the United States, and in the Argentine Republic at least the area of cultivation is susceptible of indefinite extension.

In 1891, when wheat imports from Russia and the United States were subject to the same standard duty of $11.90 per ton, the total importation of Russian wheat into Germany amounted to 515,587 tons, against 144,678 tons from the United States.

In 1892 the duty on American wheat was reduced from February 1 to $8.33 per ton, and by reason of this advantage and less favorable crops in Russia, wheat imports from the United States to Germany rose to 630,213 tons, while those from Russia declined to 257,991 tons.

In 1893, as we have seen, the disadvantage of Russia was still further increased by the tariff war, which from the 1st of August raised the German import duty on Russian wheat to $17.85 per ton, or more than double the duty rate on wheat from the United States, Austria-Hungary, Roumania, and other most-favored nations. Under these conditions our country contributed 314,928 tons of wheat and 4,196 tons of flour to Germany, while Russia furnished only 21,636 tons of wheat and 437 tons of flour.

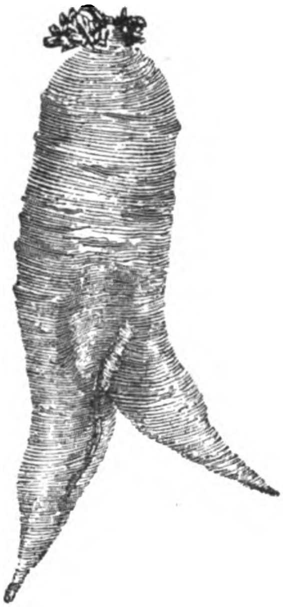
During these years American wheat has been introduced throughout a large portion of the German Empire, where its qualities are now well understood and generally liked. While the restoration of Russia to reciprocal advantages will create a new and strong competitor for the German market, America will still find here a fair field and equal favor. The result of the competition will be another example of "the survival of the fittest."

FRANK H. MASON,
Consul-General.

FRANKFORT, *February 16, 1894.*

CANAIGRE AS A SUBSTITUTE FOR BARKS IN TANNING.

At the request of Consul-General Edwards I went to Freiburg and Tharandt to find out all that I could relative to canaigre as a substitute for barks in tanning. Urged by investigations made in America and spurred on by articles in the Leather Manufacturer, German chemists sent for canaigre and subjected it to rigid, careful, comparative analyses. The first efforts to find out the value of canaigre for tanning failed because the tests were made from the green plant. Still, so good were the results, a Scotch firm offered to take 10,000 tons yearly if it could be sent for $40 per ton. Nothing came of the offer. W. Eitner, director of Vienna's experimental station for the leather industry, took up the matter, made original experiments, and gave the facts to the world in a small pamphlet. He says canaigre is especially suited to upper, saddlers', and fancy leathers. He said further that 30 marks ($7.25) per 100 kilograms (220 pounds), delivered in Vienna, would be a moderate price. He has only words of praise for the new article. So, too, the tanning school at Freiburg; although Director Haenlen told me he would like very much to get a large quantity dried, so as to make better experiments than he was able to make with what was sent him from Liverpool. The value of canaigre as a tanning medium is settled; the only question now is to get enough at satisfactory prices. The plant (see illustration) is native to many parts of America. It has long been known in Mexico, both for its tanning and medicinal properties. It grows well in Mexico, New Mexico, Texas, both Californias, Utah, and in the Indian Territory.



CANAIGRE ROOT (HALF NATURAL SIZE).

PLANT.

In these places it appears in February, just after the rainy season, ripens rapidly, and is ready to harvest at the end of May. Sometimes it begins to grow in the fall, continues growing during the winter—of course, in countries where the winter is not severe—and gives in the spring a very strong plant.

The plant has seed and root, but is reproduced from the latter, because no experiments as yet have succeeded in doing much with the seeds. The roots yield the most tannic acid. Their growth depends mostly on soil and rain. The old roots, hard as wood and almost black, are especially rich in tannic acid. The stalks, stems, and leaves have tanning material, too—enough to pay for harvesting. The cell juice in roots and leaves gives a pronounced reaction when touched with iron sulphate or double chromic acid kali. Touch a thin cut in the root with either of these reactionary agents and a precipitation takes place as soon as the cell juice is met. Age adds to the roots an excellent coloring essence, as well as tanning material.

The following table tells its own story. The canaigre tested was from 1 to 2 years old.

Roots from—	Tanning stuff.	Roots from—	Tanning stuff.
Near Florence:	*Per cent.*	Banks of Salt River:	*Per cent.*
Loose loam soil	35.6	Hard, sandy soil	22.5
Sandy soil	28.4	Formerly sandy sugar-beet field, loose loam	33.4
Loose loam soil	30.8	Sandy soil	34.3
Do	30.5	Hassyampa fine, sandy soil	30
Sandy soil, at end of canal	31.9	Do	23
Do	33.5	Average	30.5
20 miles west of Florence, loam soil	29		
Salt River hard, sandy soil	31.7		
Anga Fria	32.7		

Analyses of New Mexican canaigre gave about the same results. The one-year roots yield from 20 to 25 per cent, the older roots 25 to 40 per cent. Fresh, the canaigre contains (average) 66 per cent of water; two months old, 58 per cent; one year old, 32 per cent; dry, 8 per cent. Thus 3 pounds of fresh yield one pound of dry—30 per cent of tannin. One centner* of dry roots yields 45 pounds of extract with 66 per cent of tannin; hence 6 centners of fresh yield 2 centners of dry—66 per cent of tannin. Further, out of 6 centners of fresh one gets 2 centners of dry or 1 centner of extract. By taking the extract from roots and leaves where it grows much money might be saved and losses due to transport spared. The refuse could be used to burn or as cattle fodder, for which purpose it equals wheat straw. In extracting the tannin it is best to cut up the roots and to use a diffusion method similar to that used in extracting sugar from cane or beets. It is necessary to use copper kettles, as the canaigre influences, and is influenced by, iron. It is good, also, when extracting by means of lye and when steaming to use vacuum pans, otherwise the tannic acid runs the risk of going over into gallic acid. By steaming under small pressure there is no loss of tannin, and one gets an excellent extract of a bright color, easily soluble in water.

THE DEMAND FOR CANAIGRE.

The demand for tannin all over the world is very large. In every continent new tannin-containing plants are being sought. A fear has been felt for some time that with the constantly increasing demand the present sources of supply must soon run out. Most American leathers are tanned with oak and hemlock barks and extracts. The supply can not last forever. It is running down fast. Europe buys large quantities of the oak and hemlock, the best known barks. Even America, with its almost boundless forests of oak and hemlock, imports tannin in large quantities. In 1891 there were imported 15,000 tons of gambier (300,000 centners), worth $1,500,000. A centner of canaigre extract equals a centner of gambier; besides, it has coloring and finishing qualities, as above indicated, fitting it for special needs. One million eight hundred thousand centners of canaigre could keep out the 300,000 centners of gambier. Many practical tanners say gambier must go; that canaigre is destined soon to replace it. Large quantities are already finding their way into the world's markets and are being warmly welcomed.

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*1 centner=112 pounds.

Two experiments made by Dr. von Schroeder gave the following:

Components.	No. 1.	No. 2.
Water	11	14.69
Tannin	34.91	27.72
Dissolvable nontannin stuff	18.14	9.4
Dissolvable mineral matter	1.97	2.13
Undissolvable parts	33.98	46.06
Total	100	100

Dr. von Schroeder goes on to say that canaigre is rich in tannin; that it dissolves and gives out its acid, even in cold water; and that which it does not give out can easily be got out by hot water or steam extraction. By grinding the dry roots or plant one gets a very good material to mix with tanning barks—oak, hemlock, etc. Canaigre gives leather a soft, bright color, often a clear, bright orange. The leather comes out full, smooth, and with a good grain. Dr. von Schroeder agrees with the Vienna chemist that canaigre is especially suited to upper, saddler, and fancy leathers. He says it is one of the very best materials for uppers, and that it is also well suited to other kinds. He is very enthusiastic about it. Its large amount of tannin, the ease with which it dissolves in water, the presence of sufficient acid-producing stuff, and the beautiful color, touch, and grain that it gives commend it. If it is possible to produce canaigre in America in large quantities at fair prices, it will certainly sell, not only here, but all over the world. He says investigations made by himself resulted in showing that the centner (112 pounds), inclusive of freight, costs the tanner 15 to 16 marks ($3.60 to $3.90). This, at an average of 28 per cent of tannin, gives it to the tanneries here at 55 pfennigs (13 cents) per pound. This is much too much, and precludes importation. How much cheaper it must become Dr. von Schroeder did not say. In conclusion, I desire to say that the Freiburg station would be glad to get a large quantity to experiment on.

Anyone not satisfied with results indicated in the foregoing can send to Freiburg (address, "Gerberschule Freiburg, Saxony") and have experiments made.

J. C. MONAGHAN,
Consul.

CHEMNITZ, *February 4, 1894.*

MANUFACTURE OF OIL AND FOOD FROM PEANUTS.

INTRODUCTION.

I have the honor to acknowledge the receipt of special instruction No. 127, dated February 5, directing me to submit a report concerning the manufacture in Germany of oil, oil cake, and meal from peanuts, and particularly the extent to which peanut meal is used for food in the German army and navy. In compliance with this instruction, I respectfully submit herewith a report, with which are included as exhibits samples* of peanut meal, flour, and biscuits, as prepared by the most approved methods in this country. These samples are of essential value to the report.

The use of peanut products by the German army and navy has not yet passed the experimental stage. An elaborate series of trials was completed only a fortnight ago, and the results have been reported officially to the Ministry of War. I shall endeavor in due course to obtain copies of these reports, but it will be understood that all experiments pertaining to military or naval matters are carefully guarded in Germany, and it may in the end prove impossible to procure them. Meanwhile, the report of Dr. Führbringer, which is herewith inclosed, is the most complete and authoritative testimony as to the nutritive value of peanut meal that has yet appeared in this country.

The ordinary peanut, or "earth nut," is the seed vessel and seed of the *Arachis hypogæa*, and grows in several of the Southern States of the Union and in Brazil, the East Indies, and on the east and west coasts of Africa. In 1891 there were imported into Germany 15,762 tons of peanuts, a slight increase over the imports of the preceding year. The receipts declined to 13,158 tons in 1892, but rose in 1893 to 20,973 tons, of which 25 tons were purchased in New York, 5 tons in Brazil, while 8,471 tons came from West Africa, 5,431 tons from East Africa, and 7,040 tons from British East India. This large supply of imported peanuts is used for the manufacture of oil, and is consumed by about twenty-seven factories which are located in various parts of Germany, some of the principal ones being at Hamburg, Mannheim, and at Heilbronn, in Würtemberg.

Peanuts vary greatly in value according to the quantity, and still more the quality, of oil which they contain. The finest and most valuable come from the valley of the Senegal,† in western Africa, while the lowest grades come from Madras. The principal varieties are graded in the market according to richness in oil and general merit as follows (the percentages being based upon equal weights of shelled kernels in condition for grinding):

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* Transmitted to the Department of Agriculture.

† Samples of Senegal and East African (Mozambique) peanuts are transmitted as inclosures with the present report.

	Per cent.
Senegal peanuts	51
Congo peanuts	49
East African peanuts	49
American peanuts	42
Bombay peanuts	44
Madras peanuts	43

The duty on raw peanuts imported into Germany is $4.70 per metric ton (2,240 pounds), and the duty on peanut oil is $2.38 per 100 kilograms, equal to about 9 cents per gallon.

The nuts from West Africa and from America arrive usually in the shell, but in East Africa and in India they are often thrashed out by machinery and the seed only exported. There is thus a saving of bulk on shipboard, but at some expense of quality, as the kernel or bean of the peanut is much more apt to grow strong and rancid when naked, and more or less crushed and broken by thrashing than when inclosed in its natural husk or shell. The shells of dried peanuts constitute 23 per cent of their weight, and are used in Germany as material for certain kinds of paper or are ground up as food for cattle.

At the oil mills the kernels are ground or crushed and submitted to three successive pressings, in which a force of about 250 atmospheres is employed. The first pressing expels about 40 per cent of the oil, the second 4 per cent, and the third pressing from 2 to 3 per cent of the remainder. Cold-pressed oil of the first pressing from African or the best American peanuts is used in Germany as salad oil and for various culinary purposes. It ranges in price (wholesale) from $14.75 to $26 per 100 kilograms (approximately from 56.7 cents to $1 per gallon), which is far cheaper than any edible quality of olive oil can be imported and sold in this country. The American peanut is larger, sweeter, and, when roasted, better flavored than any of the others, but its oil is of medium quality and ranks below the African, being worth in the present market $15.47 per 100 kilograms, or 59 cents per gallon. Oil from the East Indian peanuts ranges in value from 40 to 50 cents per gallon, and like the last pressing from African and American nuts is not used directly for food, but is consumed in the manufacture of soap and for various other technical purposes, among which is included the "fattening" of oleomargarine.

The most important secondary product of peanut-oil manufacture is the oil cake or meal which remains after the oil has been, as far as practicable, extracted by pressure. This sells for from $30 to $33 per ton, and until within a year or two past has been used in Germany exclusively as food for cattle, sheep, and to some extent for horses, though it is said that it is too rich and heating for working animals, and except in the coldest weather, causes excessive perspiration unless fed in small quantities and mixed with grains. Under chemical analysis peanut-oil meal shows such extraordinary richness in nitrogenous elements that the German savants have seized upon it as an obvious source of cheap and highly concentrated material for human food, adaptable not only to army and navy rations, but of timely and important value to the peasant and industrial classes, which have suffered from a long and nearly exclusive diet of bread and potatoes, unmixed with a due proportion of nitrogenous animal food. This has led to a series of experiments, which are still in progress, and to the invention by Dr. Nördlinger, a chemist at Bockenheim, of a series of preparations from peanut meal which seem destined to play an important part in the future food economy of the German people. The problem was to convert a waste material—the secondary product of oil manufacture—into a palatable, nutritious, and wholesome form of human food, cheaper in cost than the same equivalents of nutrition could be supplied in any other form, and susceptible of simple and easy preparation by any cook of ordinary intelligence. How satisfactorily this result has been already attained is shown by the four samples which are submitted with this report, and which represent the principal forms in which oil cake from peanuts is prepared by the Rademann Food Product Factory, of this city, under the processes of Prof. Nördlinger. These are:

(1) *Peanut grits* (*Erdnussgrütze*).—The coarse meal dried, purified, bolted, and packed in papier-maché boxes containing one German pound each, which is sold at retail for 12 cents. In this form it is used for soups, cakes, and is cooked like a vegetable as *purée*.

(2) *Peanut flour* (*Erdnussmehl*).—Similar to the above, except that the meal is ground and bolted like ordinary flour. Both these preparations give the following analysis: Water, 4.8 per cent; protein substances, 48.5 per cent; oil, 22 per cent, and carbo-hydrated elements, 17.9 per cent.

(3) *Peanut biscuits.*—Dry, light, highly palatable biscuits, or "crackers," containing 1.85 per cent of water, 34.84 per cent of protein substances, 21.51 per cent of oil, 33.64 per cent of starch, 2.73 per cent of inorganic ash, and 5.34 per cent of various other nitrogenous elements.

(4) *Diabetic chocolate biscuits.*—Highly recommended for persons suffering from diabetes, and containing 2.58 per cent of water, 44.11 per cent of protein substances, 29.75 per cent of oil, 17.1 per cent of starch, 3.5 per cent of ash, and 2.96 per cent of nonnitrogenous elements.

These preparations have been in the market and in experimental use for something more than a year. One of the most important trials which they have undergone was that described in an address delivered before the Berlin Medical Society on the 8th of February last by Prof. Dr. Führbringer, director of the Friedenshain Public Hospital at Berlin, and published in No. 7 of the Berliner klinische Wochenschrift for 1893, a reprinted edition of which I transmit. It gives the results of the experiments made by Dr. Führbringer, under whose direction the peanut grits and flour were prepared in various forms and supplied as food to 120 men, women, and children, inmates of the hospital named and suffering from the usual variety of complaints that prevail in a public hospital. The report of Dr. Führbringer enters into medical details and technicalities which it is impracticable to follow here, beyond the general statement that of the 120 patients included in the experiments, more than half found the peanut meal soup palatable and excellent, and ate it gladly whenever it was offered. Of the remainder, eight or ten persons found it disagreeable in taste, and the others, while not especially fond of it, ate it without complaint. All throve well upon it, and the analyses of excretions showed that it had been in general well assimilated.

This being the case with invalids, some of whom were suffering from dyspepsia and other digestive weaknesses, it will be readily inferred that for all persons in robust health, particularly for soldiers, sailors, workingmen, and the inmates of prisons and asylums, this cheap and highly nutritious food may have an important value. Its sustaining power is remarkable. Although easily digested and assimilated even by invalids, its durability—for want of a better term—surpasses even that of the hitherto unequaled "Soja bean" of Japan and China. All this has been made the subject of careful experiment by the military authorities of Germany. In the garrisons at Frankfort and elsewhere the men have been supplied with soups made from peanut grits, and the results carefully noted in official reports which have been recently made to the Ministry of War at Berlin, and which are not yet accessible. The first series of experiments, which was made some months ago, was announced by the Ministry of War as having proved quite satisfactory, and if the later trials are equally favorable, it is probable the peanut meal will be included in the future garrison rations and "field sausage" of the German army.

Thus far, however, the most conclusive evidence in its favor is furnished by the analyses which have been made by several German chemists of high authority, and who have rendered the demonstration more striking by comparing the nutritive value of peanut meal with that of other well known forms of vegetable and animal food. One of the most conclusive of these is given by Prof. J. König, director of the Agricultural Station at Münster, and published in his "Chemie der Nahrungs und Genussmittel," second edition, volume 1, page 303. In this comparison, which is herewith quoted, the food value of each material is given in the fourth column of the table in "units of nutrition" contained in one kilogram of dry pease, beans, meal, etc.

Products.	Nitrogenous elements.	Oily matter.	Nonnitrogenous elements.	Units of nutrition.
	Per cent.	*Per cent.*	*Per cent.*	
Pease	22.85	1.79	32.36	1720
White beans	24.27	1.61	49.01	1752
Lentils	25.7	1.89	53.46	1876
Soja beans	34.08	16.45	29.53	2493
Peanut grits	47.26	19.37	19.05	3134

The bulk price of a pound of prepared peanut meal in Germany is a little more than 4 cents, and as, by the foregoing analysis, one kilogram of that material contains 3134 "units of nutrition," its price is thus reduced to a cost of about 3 cents per thousand. Upon this fact as a basis, Prof. König builds the following demonstration, showing the comparative nutritive value and cost per 1000 units, in Germany, of twelve principal animal and vegetable food materials, viz:

Food materials.	Nutritive units per kilogram.	Cost per 1000 units.
		Cents.
Skimmed milk	216	10.4
Skim-milk cheese	1914	11
Full milk	320	11.5
Bacon	2767	15.5
Butter	2610	20.4
Veal	1157	22.2
Beef	1168	26
Pease	1713	4.2
Potatoes	304	5.1
Rye flour	1328	6
Rice	1177	10
Peanut meal	3135	3

It follows, therefore, that peanut meal is not only the most nutritious, but, estimated by its alimentary value, by far the cheapest of this whole list of food materials. From its richness in protein and its low proportion of carbo-hydrated elements (starch, sugar, etc.), it is especially adapted to the use of persons suffering from obesity, and may be made to enlarge in a most welcome degree the restricted menu of patients under treatment for excessive fatness or diabetes.

From two points of view this now demonstrated value of peanut meal as human food would seem to have a direct practical interest for Americans—(1) is its increased cultivation and use as food by the German methods practicable or desirable in the United States, and (2) is this new use of oil cake in Germany likely to stimulate the future demand for peanuts of American origin? From what has been stated concerning the comparative values of American, African, and Indian peanuts as oil-producing material, the case would seem to be against the American product. When roasted it is superior in sweetness and flavor to any of the others, but when raw, the oil which it yields is inferior, both in point of quality and quantity, to that produced from the nuts from Senegambia and the eastern coast of Africa, where they are grown and gathered under climatic and industrial conditions with which our country will probably find it difficult to compete.

FRANK H. MASON,
Consul-General.

FRANKFORT, *February 28, 1894.*

[Translation.—From the Berlin Clinical Weekly (pp. 3 to 7).]

EXTRACT FROM A LECTURE BY PROF. FÜHRBRINGER ON PEANUT PREPARATIONS AS NEW, CHEAP, AND ALBUMINOUS FOOD PRODUCTS.

It is not my intention, gentlemen, to give you a description of the several methods that have been followed in the treatment of peanut grits as the fundamental ingredient in the preparation of diverse soups and porridges, the dry preparation having been discarded as unfit for human nutriment. By endeavoring to secure the highest degree of simplicity and speed in the production of the same, we have departed from the original Nördlinger formula of boiling the grits over night and of pressing the cooked ones through a sieve, and have sought for the smallest possible kind prepared which could be boiled down at once to softness. This latter kind—as the reduction of the grits to fine flour by grinding seems to encounter difficulty—we now obtain from the Bockenheim rough-ground peanut grits, both dried and roasted, as you see here. These rough-ground grits, or cribble, are treated in the same manner as are our cereals, or as meal, by boiling them at length in water or meat broth. The boiling process must be comparatively complete, a sediment of hard pieces must not remain, and at most only little grainy and loose particles should be left over. The chief manner in which they are served for food is that in the form of peanut-grits soup made with meat broth, and which, for obvious reasons, I am not able to offer you here in a sufficiently heated quantity. It resembles our ordinary oatmeal soup, and is similar in taste to the same, except that there is a slightly bitter and astringent taste noticeable. At the present time we have dispensed six hundred portions of this soup to about 120 men, women, and children, the plate containing about 25 to 45 grams* of rough-ground grits, on the average 16 grams of albumen, with an approximate nourishing capacity, therefore, of about 100 grams of meat, or two eggs, or one-third of a liter† of milk. For weeks about half this number gladly ate this soup daily, and found it to agree with them, and it is especially noteworthy that among this category, there were several who were suffering with dyspepsia and two cachectic patients with abdominal and intestinal carcinoma. Nearly the other half found the soup tolerable, and the remainder—about one dozen persons in good health or with disorders of the stomach (about the tenth part of the entire number) and chiefly females—found it offensive. On repeating the rations, the latter were affected with loathing, stomachalgia, and even attacks of vomiting. The cause of this irrepressible disgust was pronounced to be the soft, oily, bitter, and rancid-butter taste. In general, the roasted was preferred to that of the dried preparation; but sufficient data on this point for a satisfactory test are not yet available. A special effect upon the stool (which perhaps may have been slightly arrested) was not discoverable. This specific, disagreeable, oily taste, singular to state, was never pointed out in the dry roasted peanut grits, which have been variously used as an article of consumption.

With respect to the nutritiousness of peanut grits, I must mention here that the science of agriculture has already for a number of years been possessed of at least an equally valuable preparation of similar derivation—the so-called peanut cake (oil cake), of which this hard and consistent piece is a specimen from the firm of E. Heyne & Co. in Hamburg, and the possession of which I owe to the kindness of Dr. O. Freutzel. This compressed residue‡ is considered the most strengthening food for stall-fed cattle. Unfortunately, it contains that bitter and rancid taste in a much greater degree than peanut grits, and the dark remnants of the pods mixed therein are also objectionable, so that its introduction as an article of human food is confronted with difficulties. But at our children stations soup made out of this preparation was consumed by the children with satisfaction. How remarkable is it not, indeed, that the most valuable ingredient of an article of food should have become the fodder for cattle.

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* 1 gram=15.432+ grains (troy).

† 1 liter=0.88036 imperial quart, or 1.056 United States quarts.

‡ Dr. J. Freutzel, of the Royal Agricultural Institute, of this city, finds that it contains 49.3 per cent of albumen (53.8 per cent protein). The price per 100 pounds is about $2.25.

On the durability of peanut grits I am not able to report anything final, as the acquisition of the supply only dates back a few months during the cold season. Unquestionably the oily peanut is apt to become rancid much easier than our derivative substance, and the latter appears the less in danger of decomposition the less it is made fine. Up to the present time, its storage in a warm room and with defective packing has not caused it to undergo any distinct change, and that which some sensitive palates pronounce as a rancid flavor should not, without further test, be attributed to fatty decomposition. At all events, I must counsel that it be stored in the manner of the Nördlinger export article, and also to grind it a shorter period before use, as is the case with coffee.

Arriving now at the important question of exploiting this article of food, some preliminary experiments—at which I had the pleasure of the active coöperation of Dr. Freyhan, assistant physician of our hospital—have shown that in the case where the dry preparation was consumed, the greater part thereof was discharged from the body in an unchanged condition. It was especially to be regretted that the roasted grains would reappear in the stool as if the preparation had been mixed therein outside of the body. Only the finer ground particles were perhaps assimilated. Such tests are a drastic and concrete demonstration of the fallacy of the consumption of nuts and almonds comparatively rich in albumen for the purpose of nutrition.

With the boiled peanut grits it was different. Here no perceptible traces of the food are found in the stool, and on examination of the filtrate, after treating it with lye of potash very much diluted with albumen, there occurs in contrast to the heavy precipitation, when non-decomposed particles of grits are included, nothing more than a very slight clouding and opalescence. This is a guaranty of a good assimilation of the soup, evidence of which will unquestionably be furnished when the nitrogen is determined. According to Luedtke,* in Altona, even the albumen of the *Arachis* is much more easily dissoluble than that of the leguminosæ, as the cellular tissues of the peanut contain protein granules and amylum combined almost in equal parts and in equal quantity, while the very large granules of starch of the leguminous plants are surrounded by minute protein granules imbedded in a net of protoplasm.

Before concluding, I will allow myself to show you some more peanut preparations, recently sent to me by Dr. Nördlinger. First, a sample of peanut baking flour, to the preservability of which Spindler recently called attention; also, most palatable crackers, made of pure peanut baking flour, then of an admixture of wheat flour, as also macaroons, which, instead of almonds, contain peanut preparations. These crackers and pastries are, of course, reserved for consumption by the *clientela elegans*. Lastly, a substitute for coffee made of peanuts, which, having a strong taste of coffee, is much liked by patients.

Dr. Nördlinger has also informed me that tests for the production of further preparations from the raw material are in progress. On the other hand, I understand that peanut grits are already being served in various styles (such as *purées*, etc.) on the tables of Berlin families Of course, we can never consider our soup as a delicacy. What has chiefly awakened and sustained my interest is the use of the preparation as a nutriment for the sick, especially as a food for the mass of people in hospitals. For such a purpose I can with conscientiousness recommend the peanut soup prepared from the finer raw material—it is also to be hoped that even better forms will be discovered—as a strengthening, well assimilative, uncommonly cheap article of food. On the average it agrees with persons, and, when partaken after intervals of interruption, is generally liked. It is to be especially valued as a part of the diet of those suffering with diabetes, or corpulency. How acceptable to this class is any new article of food that may be added to their restricted menu. For those ailing with Bright's disease and chronic kidney disorders, where the consumption of too much animal albumen is questionable, it is also most welcome. Its use might also prove of advantage in the Playfair Mitchell cure, especially if success is had in removing the objectionable flavor described above. To effect this will, of course, require many more experiments on a large scale.

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*See "Progress in the Treatment of the Sick," 1893.

TRADE OF AUSTRIA-HUNGARY—1893.

INTRODUCTION.

It is deplorable what a poor showing the United States make in the export of merchandise into this Empire. With the introduction of free raw material into our country, we should be able to do much more business than heretofore. Manufacturers who wish a share of this business should work for it here in Austria just as they make efforts for the trade at home. Those trying to find an outlet in foreign countries usually send catalogues to a consul or ask for the addresses of one or more good business houses in their line, and thereby hope to open a field for their wares. This method will not succeed in one case in a thousand, and just so long as it is continued just so long will the Americans do but little business outside of the United States, except in articles which the foreigners must have.

What foreign merchant will order American-made goods through a catalogue, when he is at the same time either handling similar goods or is having English or German goods offered through a personal interview with a well-posted representative?

If a manufacturer at home is disinclined to go to the expense of sending out an agent, let him combine with one in another line and thus reduce expenses. This is the way the Germans and English do when they send out agents to a country where they wish to build up a trade, and we can do no better than to follow their example. Representatives of American houses will always find their consuls ready to aid them.

The year 1893 can be considered as a moderately prosperous one for Austria-Hungary. The Government's expenditures have been covered by its revenues, which were 12,000,000 florins* more during the first ten months of 1893 than of 1892.

There has been an increase in the export and import trade, and the receipts of the railroads (nine-tenths of which belong to the State) were 14,000,000 florins more in the first ten months of 1893 than in the same period of the preceding year.

The most serious obstacle Austrian industries have had to contend with during the past year has been the fluctuations in the value of the paper currency.

INTRODUCTION OF SPECIE PAYMENTS.

The Government of Austria-Hungary was not, in spite of the large amount of gold which it has bought for the purpose, able to carry out its intention of establishing a gold currency in the year 1893. One reason why this important reform could not take place was the depreciation in Government securities caused by the conversion, in the first part of January, of the Government bonds at 5 per cent into bonds at 4 per cent. While 5 per cent interest-bearing paper was sought for in foreign money markets, bonds at

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* 1 florin = about 39 cents.

4 per cent offered no such inducement, and consequently the larger portion of Austro-Hungarian bonds held in foreign hands were sent home for liquidation and the differences therefrom had to be made good in gold, which caused the currency to depreciate still further. The loan effected, in order to carry out this conversion, was to the value of 324,000,000 florins for Austria and 549,000,000 florins for Hungary.

The initiatory steps for the assumption of specie (gold) payments was the buying up of gold in open market, a large portion of this metal being in American eagles. The balance of gold was realized by disposing of bonds bearing interest in gold at 4 per cent. The stock of gold brought together is about 300,000,000 florins. The larger part of this amount has been converted into Austrian kronen.

The amount of paper currency in circulation is 412,000,000 florins, 100,000,000 florins of which is to be redeemed in Austria alone, the remaining 312,000,000 by Austria and Hungary together.

Austria will be able to redeem the 100,000,000 for which she is specially responsible by an issue of bonds, deriving their interest from the proceeds of the Government salt works.

Of the 200,000,000 florins which are to be withdrawn from circulation by Austria-Hungary in 1894 and 1895, 40,000,000 are to be bought with silver and 160,000,000 with bank notes issued by the Austro-Hungarian Bank. The Government will deposit with the above-named bank an amount of gold equal to the value of the notes emitted.

It is not expected that the Austro-Hungarian Government will be able to establish a gold currency for some years.

AUSTRIAN IMPORTS AND EXPORTS.

Year.	Imports.	Exports.
	Florins.	*Florins.*
1892 (11 months)	569,900,000	666,100,000
1893 (11 months)	617,800,000	742,600,000

The excess of exports over imports was 96,200,000 florins in 1892 and 124,800,000 florins in 1893.

The principal increase in goods imported was in the following articles:

Articles.	Amount.	Articles.	Amount.
	Met. cent.		*Met. cent.*
Grains and flour	1,152,053	Earthenware	195,115
Fruits and vegetables	578,787	Iron and ironware	252,940
Beverages	690,977	Chemicals	172,330
Coal and wood	5,423,951	Waste	249,962
Minerals	224,441	Fruits	55,197
Mineral oil	137,928	Animal products	24,615
Flax, hemp, and jute	162,956	Paper and paper ware	5,882
Stoneware	149,167		

The total imports for the first eleven months of 1893 were 68,562,123 meter centners. The imports from different countries were:

From—	Amount.	From—	Amount.
	Met. cent.		*Met. cent.*
Germany	50,124,194	Switzerland	380,741
Great Britain	2,426,637	Turkey	419,752
France	255,452	Roumania	419,752
Italy	3,742,622	Servia	960,320
Russia	3,210,734	Other countries	6,062,997

The imports from the United States were so small that they are put under the head of other countries in the Government statistics.

The total exports of Austria-Hungary for the first eleven months of the year 1893 were 132,599,852 meter centners, which shows an increase over 1892 of 3,726,492 meter centners.

The following articles of export show the largest increase in 1893 over 1892:

Articles.	Amount.	Articles.	Amount.
	Met. cent.		*Met. cent.*
Sugar	600,552	Minerals	789,213
Grain and flour	1,122,948	Wood and bone ware	35,220
Vegetables and fruit	104,073	Earthenware	50,236
Animal products	25,220	Iron and ironware	46,696
Lard	104,857	Chemicals	32,297
Beverages	106,893	Waste	238,511
Coal and wood	349,093		

The largest quantities of goods exported are comprised among the following articles:

Articles.	Amount.	Articles.	Amount.
	Met. cent.		*Met. cent.*
Coal and wood	96,617,752	Waste	2,653,145
Grain and flour	10,116,016	Beverages	1,367,920
Minerals	7,913,719	Total	125,859,890
Sugar	4,553,988		
Vegetables and plants	2,633,350		

The above is equal to 96 per cent of the total export.

During the year 1893 the value of the exports from Austria-Hungary to Germany, Italy, and Roumania was greater than the value of the imports, while to the United States, Great Britain, India, France, and Switzerland the value of the exports was less than the value of the imports.

The reason why the balance of trade was in favor of the United States was on account of the large amount of gold imported into Austria for the purpose of establishing a gold currency.

SUGAR EXPORT.

One of the most important increases in the export trade of Austria has been in beet-root sugar.

The total value of the sugar exported from this country during the year 1893 was $38,000,000, which is an increase of nearly $9,000,000 over the year 1892.

The total amount exported to the United States during the year 1893 was $3,306,954.45, which shows an increase over the preceding year of $1,380,521.28. Though Austria exported sugar for the first time in 1864, and that only to the value of $670,555, the value of the sugar exported for the last ten years amounted to $255,768,490.

The export of refined sugar has developed more rapidly than the export of the raw material, and it is mainly due to this cause that the amount of money paid to Austria for sugar has increased in the last three or four years to such an extent.

IMPORTATION OF AMERICAN TROTTING HORSES.

The importation of American trotting horses for breeding purposes into Austria-Hungary has recently become quite a business. There are no horses in Austria specially adapted for trotting, and efforts have been made for some time to improve the native stock by crossing with Russian stallions of the Orloff breed. The American trotting horses have proved themselves so far superior in speed, endurance, and reproducing powers that they are almost the only trotting horses now imported. They bring good prices and will in all likelihood be imported until the Austrian carriage horses have all been crossed with American blood.

RAILROAD TRAFFIC.

In spite of the depression caused by the outbreak of cholera in Hungary and Galicia, there has been a decided increase in the amount of business done by the Austro-Hungarian railroads. The total amount of business done during the first ten months of 1893 was $82,400,000, which is $5,600,000 more than in the same period of the preceding year. The earnings of the railroads were $4,562 per kilometer, which is an increase of $200, or about 4½ per cent over the year 1892. The length of tracks has been increased by only 300 kilometers, the total length of all railroad tracks in Austria-Hungary being 28,052 kilometers at the close of the year 1893.

MINING INDUSTRY.

Mining is one of the most important of the Austrian industries. There were 38,076 mining claims at the close of the year 1892, of which 3 per cent were for gold or silver, 4 per cent for iron, 75 per cent for coal, and 16 per cent for other minerals.

The total number of workmen employed was 121,876, of whom 178,302 were men, 7,172 women, and 6,402 minors.

The earnings of the mines for 1892 were $10,000,000.

NEW LEGISLATION.

Considerable legislation has taken place in this Empire during the year 1893. Treaties with Switzerland, Servia, and Korea, a railroad convention with Russia, and a special treaty with Roumania relative to the protection of trade-marks have been agreed upon.

In order to facilitate the paying of interest on bonds, the title to which is under litigation, a law was passed permitting such bonds to be deposited with the Austro-Hungarian Bank instead of with the court.

Information bureaus, which formerly were only allowed to instruct their clients in matters relating to the business standing of registered firms, are now permitted to give information relative to the solvency or business standing of private parties.

The transport of explosives by railways, concessions for building purposes, and the subvention of merchant vessels have been regulated or affected by legislation.

In Austria-Hungary there are many large landed proprietors who, with extremely cheap labor at their command, make it very difficult for the small landowners to compete with them. To protect the latter a bill has been passed by which the owners of small farms are obliged to join certain agricultural associations who lend money at low rates to members, and by selling their farm produce in large quantities are able to obtain better prices for the small owners.

In order to maintain a prosperous peasantry, the former laws relating to the inheritance of real estate have been radically altered. Instead of allowing small estates to be divided equally among the heirs, the estate goes to the next of kin. In case there are sons, the eldest inherits the land, while the rights of the other children are maintained by a regular interest derived from a mortgage on the estate.

UNIVERSAL SUFFRAGE.

A proposal was made by the employés of the Northwest Railroad, one of the most important companies in the Empire, that the labor unions of Austria-Hungary institute a general strike in order to obtain universal suffrage. A strike on a gigantic scale would have taken place if it had not been for the opposition of the members from the Tyrol. Shortly afterwards the prime minister, Count Taafe, proposed the introduction of universal suffrage. The bill was so framed as to increase the political power of the workingmen, but met with so much opposition from the so-called middle classes that it was the cause of Count Taafe's ministry resigning.

MAX JUDD,
Consul-General.

VIENNA, *February 28, 1894.*

GAS MOTORS FOR STREET RAILWAYS.

There is in the mechanical record of the past year in Germany no fact more noteworthy than the trend of expert opinion in favor of gas engines as motors for street and suburban railway cars. This has come at a period when electricity seemed to be on the point of replacing and superseding all other forms of motive power for this special purpose, and when the construction, equipment, and economical working of street railways have been more than ever before in this country the subject of practical experiment and scientific study.

In a general way Germany has hitherto been far behind the United States and some other countries in the adoption and extension of street railways. The rapid increase of population in the cities and industrial towns has recently attracted special attention to this subject, and, before investing their money and giving up their streets to tramways, the various municipalities have, with characteristic foresight, taken up the study of the several competing systems in a very thorough and deliberate manner.

The objections to horse railroads are well known. Although cheap and easy of construction, and although horse cars are the simplest and lightest vehicles that have ever been devised for such a purpose, such roads are unclean, and, in the end, expensive to operate. Horses and forage are both costly in Germany; the animals are exposed to accident and disease, and in case of war would be subject to immediate conscription for military purposes.

Steam tramways are noisy, terrifying to horses and timid people, dirty by reason of smoke and soot from the engines, and, what is still more serious, they can only be operated profitably on lines where the travel is regular, constant, and sufficiently heavy to require one or more cars to be attached to the motor vehicle. Recent improvements have modified to some extent the first two of these difficulties. There are in operation, for instance, on the suburban line between Wiesbaden and Bieberich locomotive cars which run quietly and emit little or no soot or smoke; but they cost nearly $6,000 each, require both an engineer and fireman, and are for other reasons impracticable for street service in crowded cities.

Cable roads are costly to build. Their construction involves the tearing up of streets and underground constructions, which the German municipalities are loth to permit, and in operation the cable must be kept going throughout its entire length, with all incidental loss of power through friction, the same during all hours of day or night, no matter what may be the varying requirements of travel. Then, unless a double line is provided, the breakage or jamming of the cable or any accident to the engine paralyzes instantly the entire system. So that, while cable roads are admitted to be most advantageous for steep ascents, they are considered in this country as open to grave objections for ordinary use in crowded streets.

Electricity, as now applied, solves many of the difficulties which have hitherto beset other methods of propulsion, but everyone knows that the noise, the danger and unsightliness of overhead wires, and the high cost, as well as the waste and uncertainty, of underground lines are serious objections and entail general complaint. Here, too, the current must be worked at full energy whether there are ten cars or twenty or fifty in service at any specified moment. Of course, all scientists hope and expect that a perfect storage-battery system will yet be developed which will abolish both ground and overhead currents and make each car independent; but at Brussels and Hamburg, where storage-battery cars have been extensively utilized, the accumulators must be changed once in from three to five hours, and weigh from 2 to 4 tons for each car, giving a dead weight and cost of manipulation which, added to the large percentage of loss in electrical energy, leave this method at its present stage open to serious objections from a practical standpoint. Twenty, or even ten, years hence the storage-battery motor may be the ideal one, but it is not so yet.

The problem, from the German standpoint, has been to devise a motor which shall render each passenger car independent, one which, during days or hours of increased travel, can draw one or more additional cars, which can be run upon rails laid at any reasonable grade without overhead wires or any subterranean construction; a car which can be started and stopped quickly and surely by one man, which can be supplied in any required number during the busy hours of the day, and when not in use can be run into a shed and left, without consuming or wasting anything, ready for immediate service when needed; a car that shall run silently, without hissing steam or defiling smoke, and which shall be withal not too costly in construction or too complicated to be handled and kept in order by an average mechanic. These requirements, in the opinion of many experts, narrow the choice down to two forms of motive power, coal gas and compressed air. The use of compressed air for such purposes is perhaps still in its infancy, but its advantages are frankly conceded. It is clean and quiet, it causes no smell or unpleasant heat, and the car is under perfect control and is wholly independent of wires or other connections along the line. But in Berne, where air compressed by water power under highly advantageous conditions has been used, it is found that at a pressure of 32 atmospheres 4.2 cubic meters of air are required to produce one-horse power, or about 150 cubic feet per horse power per hour. Each car carries twelve reservoirs, with an aggregate capacity of 2,170 cubic feet, which can be filled from the main reservoir in eight minutes. Thus provided, the car, which, at Berne, weighs when empty about 7 tons, can run 12 miles, but at an expense of 15 cents per car mile, which exceeds the cost of horse power. On certain lines which lead through luxurious suburbs, where travel is heavy and high fares may be charged, compressed air may be recognized as the ideal motive power of the future. But since it is found that in Berne, with all its advantages of compression by water power, the cost of operation exceeds that of horse cars, the chances would seem to be against its general adoption for ordinary city and suburban lines.

A careful study of the whole subject has led to the adoption in two notable instances of cars propelled by gas engines. These practical trials have been made at Neufchâtel, in Switzerland, and at Dresden, and the results in both cases, although not yet perhaps wholly conclusive, have been so favorable that they seem to be worthy of examination. The conditions to be met in Neufchâtel and at Dresden were somewhat different, but they are substantially similar to those which exist in many of the smaller cities of the United States.

At Neufchâtel there was required a new line 3⅓ miles in length to connect that city with the village of St. Blaise. Nine-tenths of the distance lies outside of the city limits, and through a district which could furnish but few passengers. The estimates had to be made on a basis of one car either way every half hour during fourteen hours of daily service, with an average of seven passengers per car, each paying 5.7 cents for the through outward or return trip.. The contract for the equipment was let to a firm in Vevey, which undertook and fulfilled the task of providing motor cars to be driven by gas engines supplied with ordinary illuminating gas from the city mains. These cars are strong and practical in construction ; they run quietly, without jar or smoke, stop and start quickly, and the machinery requires to be cleaned but once a week. Each motor car carries twenty inside passengers, and weighs, when filled, about 6 tons. They cost, delivered at Neufchâtel, $2,856 each. These cars can pass curves of 100 feet radius, run backwards or forwards with equal facility, and with 7.9-horse power are able to traverse any part of the line—which is 40 feet higher at the midway point than at either terminus—at a speed of 11 miles per hour. Gas compressed to 6 atmospheres is furnished by the city gas company at $1.09 per thousand cubic feet, and it is found that under such conditions the cost of gas per car for the round trip—6½ miles—is 19.3 cents, or about one cent per passenger for a filled car or half a cent per passenger for the single run from Neufchâtel to St. Blaise or return. This brings the net operating expense per passenger so far below the cost of electricity, horse power, steam, or compressed air that, although the experiment is still new, the problem is thought to be solved in favor of gas for all roads of a similar class.

But by far the most elaborate and interesting experiment is that which has been made at Dresden, where a street railway about 3 miles in length is operated with gas-motor cars invented by a German engineer named Lührig, and built by a company at that place, the engines themselves being supplied by the well known Gas-Motor Fabrik at Deutz. This system has been in operation for several months, and has been the subject of careful study and investigation by committees and experts from other municipalities which have in contemplation enterprises of a similar nature. Among others, the city of Nordhausen sent a commission headed by a Government railway engineer to examine and report on the working of the new system, and the report of this committee, while recognizing that there remain some minor difficulties yet to be overcome, declares the system a practical success and recommends its adoption at Nordhausen. At Dessau another line to be similarly built and equipped is now under construction, and will be put in operation during the coming summer. Germany has therefore definitely started toward the adoption of gas-motor cars for a certain class of roads, and the experiment has reached a stage at which it deserves the attention of practical engineers in other countries.

The Lührig motor car is built to accommodate sixteen passengers seated within, with standing room for five besides the motor man on the front platform and six on the rear platform. Passengers are not allowed in Germany to stand in the aisles of street cars holding to straps. Under the American system of crowding and packing one of the Lührig cars would carry perhaps forty people. Power is supplied by two double-cylinder gas engines of 7-horse power each, located on either side beneath the seat and carefully inclosed in zinc sheathing, which excludes gas and smells and protects the machinery from dust or contact. Under the framework of the car are located at each end four cylindrical reservoirs, the whole eight having an aggregate capacity of about 360 cubic feet of gas, sufficient to run the car 11 miles over a road in which the grades do not exceed one foot in twenty. The car weighs, without passengers, 7½ tons, and can be made for from $3,500 to $4,000, according to the number included in one contract. The cylinders of the engine are kept cool by water circulating through pipe leading from a cylindrical reservoir carried on the roof of the car, the heated water rising and the cold descending automatically and with such satisfactory results that after a run of several miles the warmth of the cylinders may easily be borne by the naked hand.

Gas is supplied from the ordinary street mains, and is compressed to 8 atmospheres by a simple double-barreled force pump worked by a stationary gas engine or other power, and at this pressure the reservoirs of a car may be filled through a flexible pipe in less than a minute. Gas costs in Dresden $1.05 per thousand feet, and, in view of the advantage which such a wholesale, all-the-year-round consumption would offer to gas companies, it is safely assumed that most of them will be quite willing to erect compressing machinery at their own cost and deliver the gas to the motors at the prescribed density. The car is managed by one motor man standing on the front platform, who, with throttle and governor, regulates the speed at will from 150 to 240 engine revolutions per minute. As the double engine gives a motive force of 14-horse power, a second car may be attached whenever needed, thus doubling the capacity of the line during hours or days of greatest activity. A loaded car climbs a grade of 1 in 15 at a speed of 4 miles per hour, but for satisfactory work in all weathers and seasons the grades should not exceed 1 in 20.

In an address delivered before the German Gas and Water Supply Association some weeks ago, Chief Engineer Kemper, of Dessau, submitted a comparative estimate for the construction and equipment with gas motor, electrical, and horse cars of a street railway 5 miles in length and requiring an outfit of twenty cars for ordinary service. In these estimates double tracks for all, two compressing stations at $2,500 each, sheds, etc., for the gas-motor cars are included; for the electrical roads dynamos and overhead wires, and for the horse cars 120 to 150 animals with the requisite stabling and fixtures, the intention being to show the comparative cost of building and putting into operation the same road under each of the three systems. The exhibit is as follows:

Electrical	$180,880
Gas motor	142,800
Horse cars	133,280

The original construction and equipment account is therefore slightly in favor of horse cars as compared with gas motors, though both are notably cheaper than the electric plant. But this difference in favor of horse power rapidly disappears when the cost of daily operation is taken into account. As the result of careful study, Mr. Kemper states the net operating expense of horse cars in Germany at 5½ to 7 cents per car kilometer, against 5 cents for electric cars and 4 cents for gas-motor cars of the Lührig model per car kilometer. There is thus claimed an economy in motive power of 25 per cent in favor of gas as compared with electricity and from 60 to 75 per cent in comparison with horse power. It may be safely assumed that every town with area and population sufficient to require street-car service has already a gas supply, and that gas companies will everywhere be willing to favor this new and important outlet for their product by offering long contracts at favorable rates. Otherwise two or more street-car companies could profitably combine and manufacture their own gas supply.

It is, of course, too soon to declare that the entire problem has been definitely solved, and no one will pretend that the Lührig motors (which have undergone several improvements since being put into service) have reached or even approached the ultimate standard of utility; but the superior economy of gas motors over other means of propulsion for certain classes of tramways seems to be conclusively proven, and from this secure vantage ground whatever difficulties yet remain will surely be mastered.

FRANK H. MASON,
Consul-General.

FRANKFORT, *January 25, 1894.*

PRICE OF AUSTRALASIAN COAL.

The condition of affairs in the coal trade of this city (Newcastle) has assumed an extraordinary development. An agreement which for years bound together a number of the more important collieries, under which the selling price of coal and many other matters of mutual concern were regulated, expires on the 31st instant, and is not to be renewed. The effect of this necessarily means a reduction of 9*s.* per ton in the present selling price. One of the most powerful collieries producing first-class coal has publicly announced the selling rate for 1894, free on board ship, at 8*s.* ($1.94), less 2½ per cent, per ton of 2,240 pounds. This may be taken as the nominal and maximum selling price. Better buying terms can doubtless be obtained for coal of equal quality. The price is thus reduced to a figure at which only those collieries most favorably circumstanced can live, and cutting prices for business will probably be the order of the future.

While matters stand thus among the owners, there is another difficulty between them and the miners. The latter have always hitherto been paid hewing rates on a uniform and sliding scale, based upon the selling price, their wages advancing or falling 1*d.* in 3*d.* in sympathy with the market price of coal, but so that at 9*s.* the rate should not fall below 3*s.* 6*d.* per ton of round or screened coal hewn. Nothing at all is paid for small coal which passes through screens of ¾-inch mesh at the pit's mouth. The rates have been governed by an agreement existing between the proprietors and the miners, but this is to be terminated at the end of the year 1893, so that absolute free trade is now the order of the day both as regards price of coal and wages to be paid the miners. The colliery before alluded to as announcing the reduction in the selling price to 8*s.* has notified that from and after the 1st of January, 1894, it will pay its miners 3*s.* 2*d.* per ton for screened coal, a reduction of 4*d.* below the recognized minimum. Four other large collieries have announced their determination to pay their miners 2*s.* 10*d.*, a still further reduction of 4*d.* The miners, by general resolution, throughout the district have, so far as at present ascertained, a majority favorable to accepting 3*s.* 2*d.*, and threaten not to work for less than that rate. I may point out that the majority of collieries have not made any announcement of their rate, but it is known that their opinions are favorable to a sum below 2*s.* 10*d.* They, however, are not prepared to fight for their opinions, and some of them are not willing to come to cross-purposes with their men, even for a 2*s.* 10*d.* rate, being apparently resolved to carry on work. The strong probability therefore is that if there is a strike at all there will be sufficient pits at work to supply any demand that may arise for coal from Newcastle on and after the 2d of January proximo.

STEWART KEIGHTLEY,
Vice-Commercial Agent.

NEWCASTLE, N. S. W., *December 23, 1893.*

ESTIMATED GERMAN SUGAR PRODUCTION—1894.*

According to the Reichsanzeiger (Imperial Advertiser), the official organ of the German Government, there were 8,150,000 tons (1 ton=2,200 pounds) of sugar beets made into sugar in four hundred and five factories in Germany up to the 30th of November, 1893, which leads the Government to estimate the probable total consumption of sugar beets by the sugar factories of Germany during the sugar year ending July 31, 1894, at 10,450,-

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*See No. 161, p. 347.

000 tons. During the sugar year 1892–'93 only 9,800,000 tons of beets were worked up in four hundred and one factories. There will be, therefore, a probable increase during the present sugar year in the quantity of beets converted into sugar of 650,000 tons. Last year it was about 100,000 tons over the preceding year.

These figures show that the reductions made by legislation in recent years in the rebate or export bounty on exported sugar have not had the restrictive effects on sugar manufacturing in Germany feared by manufacturers.

JAMES H. SMITH,
Commercial Agent.

MAYENCE, *January 3, 1894.*

THE GOLD FIELDS OF BRITISH GUIANA.

Of late years considerable attention has been drawn to the mineral wealth of British Guiana, and especially to the mining of gold, which was first undertaken on a small scale in the year 1883, and which has developed until the mining industry in the colony is second only to that of growing sugar cane.

In the year 1884 there were produced 250 ounces of gold, valued at £1,020. Each successive year has noted an increase in the output, and it is estimated that the value of the gold produced in the fiscal year 1892–'93 will be not less than £700,000. Gold seems to abound in more or less paying quantities in all sections in the interior of the colony; but, owing to the heavy undergrowth, or bush, as it is locally termed, the entire country is inaccessible and, up to the present time, incapable of development, excepting only those portions which can be reached in open boats on the various rivers and tributary streams. Sooner or later the interior will be developed, the brush cleared away, and it is safe to assume that the world will have a new gold field of very great importance. Considerable quartz has been found in several places, but at present there is only one quartz mill in operation, although a great many placer claims are being worked. Another company has ordered a 40-stamp mill, which will soon be in operation; and it is claimed that there is enough exposed quartz now at hand to keep the mill busy for at least a year. The ore is not so rich as that of California and elsewhere, and there is no question of the fact that there has been considerably more money sunk into the ground here than has ever been taken out of it. However, this is probably due to local conditions, such as the lack of experienced men, the difficulty and expense of transportation of labor and provisions to and from the base of supplies, and, most important of all, the inferior quality of labor which can be commanded.

LABOR.

There is no white labor to be had here, and the negroes who perform the manual part of the work are about as worthless and lazy as can be imagined, not to speak of their moral and mental deficiencies, which are matters of no slight importance. The colonial government has enacted a series of mining regulations with the evident intention of protecting both capital and labor. The laborers on signing their contracts are regularly indentured for a period of three months; their pay is 64 cents per day per man and keep. An advance of $6 per man is allowed on signing contracts, which contracts are approved and recorded by the gold commissioner. The trouble is to get a negro laborer to live up to his contract, and desertions are serious matters when the remoteness of the mines is considered. There is a penalty of confinement in jail for such desertions, but it seems inadequate, for the reason that a Demerara negro would just as soon be in jail as out of it, so long as he has enough food to fill his stomach. The cost of labor—64 cents per day—seems very low, but when its quality is considered it is conceded that the remuneration is ample.

LOCATION AND ACCESSIBILITY OF THE GOLD FIELDS.

There are five separate and distinct fields in the colony, each of which is more or less difficult to reach on account of the very primitive methods of transportation.

There are no railroads penetrating the interior, although there is considerable talk, as there has been for years, of building one; and, strange to say, there is not even a dirt road or footpath for the use of either man or beast. The only way to reach the gold fields is by open boat propelled along the rivers by native Indians. The fall of the rivers is very steep, and there are numerous falls and cataracts to be passed, which make the journey laborious and expensive, and also very unpleasant with the hot sun continually beating down on the traveler's head. Provisions and supplies of all kinds must be transported in the same way. This, with the number of men one must employ, makes mining in British Guiana an expensive undertaking. As an instance of the inaccessibility of the various fields, it may be mentioned that certain districts less than 100 miles from the city of Georgetown are three weeks distant in time.

MINING REGULATIONS.

In addition to the regulations applying to labor, the colonial government has passed other laws, chiefly with an eye to its own financial benefit. The most important of these is the government tax, or royalty, of 90 cents per ounce on all raw gold produced. Out of this tax has grown an evil which is bitterly complained of by all mine operators, especially Americans. This is the searching of the person and effects of all those coming down from the diggings, in order that no gold may be smuggled. It is an open question whether or not this searching is legal, but so far no proper test of it has been made in the courts. It is doubtful, even if the test were made, that a just decision would be given, as the average Demerara magistrate is remarkable principally for his ignorance of law. As an instance of how this searching is done, and also to give an example of Demerara justice, I will cite a case of an American miner who recently came down the Barima River with some twenty of his negro laborers. When the party reached the searching station they were huddled together in one common group, manager and blacks together, and, with the exception of the manager, searched. When his turn came he stated that, while he would not object to being searched, he would refuse to have it done in public, with his clothing removed and person exposed to the view of all. As a result of this action he was summoned before a magistrate and fined $125 and costs, amounting in all to about $160. In order to prospect in this colony, one must procure a license therefor, which costs $6 per year. There are also small fees for registering laborers, etc. Another great cause for discontent with the mining laws arises from the fact that no title or patent can be got outright for mining claims, the same being given only provisionally. The government requires that a certain amount of work must be done annually upon such claims, and for the breach thereof the property reverts to the government, no matter how much labor or money may have been previously expended on it.

NEED OF PRACTICAL MEN.

One great drawback to the development of the gold fields, and the chief reason why so much money has been unnecessarily squandered therein, is that there is no native of this colony who has the slightest idea of the proper way to develop and operate a mining property. Unfortunately, moreover, the majority of miners who have been secured from other places are totally incompetent for the performance of their duties. There are men managing valuable mining properties here who do not possess the qualifications properly to conduct the operations of a coal mine. The few practical men here at present are, with hardly an exception, Americans.

CLIMATE AND HEALTH.

Notwithstanding representations to the contrary which may be made by interested parties, the climate of British Guiana is bad. This statement is forcibly borne out by the official mortality statistics, which show the death rate to exceed the birth rate in a ratio of about two to one. The climate is bad enough in Georgetown (Demerara) and along the seaboard, but it is infinitely worse in the interior. There has been no yellow fever in epidemic form in the colony for several years. At the same time other fevers of all kinds abound; also malaria, ague, rheumatism, and a variety of ailments native to any section which is low, flat, and swampy and which is at the same time hot.

All persons coming from a northern climate should be most careful of their health while in British Guiana. When one becomes sick here it does not take long to have the case decided. In a few hours the patient has either recovered or is dead. It is important in this climate that one should be very abstemious in the use of liquors, the abuse of which frequently results fatally. This applies especially to miners or those whose business takes them into the interior. Another thing to guard against is the wearing of wet clothing, which will bring on fever. As it rains incessantly here for months at a time, this is a hard thing for a miner to do, in view of the fact that his duties naturally subject him to exposure.

In summing up this report it may be well to mention that it is the intention of the writer neither to persuade American citizens to come here and try the gold fields nor to dissuade them therefrom. The facts herein contained are reliable, and were furnished by the best authorities. There is plenty of gold here, and the only difficulty is to get to it, only an insignificant portion of the gold territory having been explored, much less located. I should give it as my opinion, based upon the testimony of practical experts familiar with the field, that a miner who is thoroughly acquainted with his business and has a moderate amount of capital to back him up (say not less than $2,500) can come here with reasonably fair prospects of success. I should strongly advise against the coming of all those who do not possess the following five qualifications: (1) A thorough and complete knowledge of mining; (2) a moderate capital to equip his party; (3) a good, sound constitution, without organic disease; (4) the willingness to indulge very moderately, if at all, in the use of alcoholic or malt stimulants; (5) the ability to properly command and direct labor drawn from the very lowest classes.

LOUIS S. DELAPLAINE, JR.,
Consul.

DEMERARA, *January 10, 1894.*

SWEDISH BEET-SUGAR INDUSTRY.

GENERAL AGRICULTURE.

A glance at the map will show that the Scandinavian peninsula lies opposite Greenland. This peninsula is composed of the sister kingdoms of Sweden and Norway, and though Sweden extends the farther to the south, still its most southern cape reaches down only to 55° 20′ north latitude, the latitude of Labrador.

Bearing this fact in mind—that all Sweden lies north of the parallel of mid-Labrador—it surely seems a paradox to be told that the chief occupation of the Swedes is agriculture; and furthermore, that the products of husbandry in Sweden are not only sufficient for its own inhabitants, but leave a surplus for export, for, although Sweden imports large quantities of rye, maize, wheat, flour, and pork, it exports still larger values of oats, live animals, meats, and dairy products; so that the balance of agricultural trade is in its favor.

PRODUCTION OF SUGAR.

But the greatest marvel in Swedish agriculture is the fact that this far-northern country produces sugar in large amounts; that the production of sugar has increased more rapidly the last dozen years than any other product of the soil; and that, if the present rate of increase continues for only three years more, Sweden will furnish sufficient sugar for its own people and have a balance for export to the markets of the world. Exact statistics will fully sustain the above statements.

The sugar of Sweden is made from beets, and the following table shows the number of beet-sugar factories in the Kingdom and their output for the eleven years 1882–'92:

Year.	Number of factories.	Raw sugar produced.
		Tons.
1882	1	1,472
1883	2	1,957
1884	2	3,655
1885	3	4,940
1886	3	5,058
1887	3	5,953
1888	4	9,358
1889	4	10,822
1890	6	16,307
1891	8	27,241
1892	....	30,781

This sugar is all the product of beets grown in Sweden, and the increase in production is simply enormous.

CONSUMPTION OF SUGAR.

The amount of sugar consumed in Sweden is given in the following table, which shows the number of tons used for each year from 1883 to 1891. It must be borne in mind that the figures in the following table represent refined sugar, whereas those in the foregoing are for raw sugar. For purposes of comparison, 100 tons of raw sugar may be taken as equal to 90 tons of refined.

Year.	Refined sugar consumed.	Year.	Refined sugar consumed.
	Tons.		*Tons.*
1883	38,914	1888	44,589
1884	40,753	1889	48,163
1885	41,353	1890	51,343
1886	41,392	1891	54,336
1887	42,656		

It will be seen that we have here to deal with an increasing consumption, as well as with an increasing output.

ESTIMATED PRODUCTION FOR 1896.

Reckoning that the consumption will continue to increase in the same ratio as heretofore, we find that in the year 1896 Sweden will make use of 64,000 tons of refined sugar.

A careful estimate of the output of the Swedish factories, adding to the regularly increasing product of the ten factories now in operation the probable product of four new factories just built or being built, shows that in 1896 there will be produced in Sweden 76,000 tons of raw sugar, equal to 68,400 tons of refined. Hence in 1896—the year after next—Sweden will probably produce not only sufficient sugar for its own inhabitants, but have a surplus for export.

It is true that the Swedish sugar beets are all raised in the southern portion of the country, and nearly all in a comparatively small section in the extreme southwest. It is also true that the Gulf Stream, conveying the waters of the tropics to the northwest of Europe, gives to the Scandinavian peninsula a climate milder than that enjoyed by any other northern land. Still, after all allowances have been made, Sweden remains an extreme northern country, with long winters, short summers, and in general a hard soil. That in such a country the production of sugar should have advanced with such rapid strides and reached such grand proportions, constitutes one of the marvels of agriculture on our globe, and might well serve as an example and an incentive to the people of the United States, who live in a more fertile land and under milder skies.

W. W. THOMAS, Jr.,
Minister.

STOCKHOLM, *January 17, 1894.*

LA GUAYRA-GENOA STEAMSHIP LINE.

I have the honor to report the arrival on the 20th instant of the Italian steamship *Rosario*, of the "La Veloce" line, a new monthly line between Genoa and La Guayra. The *Rosario* is the first Italian merchant steamship ever seen in this port. She has a tonnage of 2,000 net. The other ships of this line are about the same size. They leave Genoa, with passengers and cargo, on the 1st of each month, stopping at Barcelona, Malaga, Canary Islands, Barbados, La Guayra, Puerto Cabello, Savanilla, Cartagena, and Colon; returning to Genoa via La Guayra, Puerto Rico, and St. Thomas. The increasing trade between Venezuela and Europe has led to the establishing of three new lines of steamers between European and Venezuelan ports during the last year. Without doubt this is due to the decreasing trade between Venezuela and the United States.

PHILIP C. HANNA,
Consul.

LA GUAYRA, *January 23, 1894.*

NOTES.

Newcastle (N. S. W.) Exports, 1893.—Mr. Stewart Keightley, vice-commercial agent at Newcastle, New South Wales, transmitted to the Department, under date of January 20, 1894, the following statistics, taken from the Newcastle Morning Herald of January 4, 1894:

Export of coal for 1893.

Countries to which exported.	Quantity.	Value.
	Tons.	
Victoria	644,479	£279,193
New Zealand	154,294	65,315
South Australia	127,223	52,024
Queensland	13,611	5,809
Tasmania	62,005	26,017
Western Australia	19,980	8,579
Hongkong	20,110	8,746
United States	209,269	100,311
Java	30,533	14,884
New Caledonia	10,437	4,538
India	28,283	11,890
Philippine Islands	33,239	16,327
Fiji	6,265	2,210
Mauritius	5,841	2,921
Peru	12,711	6,089
Chile	141,940	67,806
Sandwich Islands	32,139	15,012
Mexico	3,643	1,822
Solomon Islands	520	260
South Sea Islands	386	193
Panama	2,346	1,173
Singapore	9,900	4,460
Madagascar	2,062	1,031
Great Britain	5,106	2,335
Natal	3,002	1,101
New Guinea	540	270
Ecuador	1,318	659
Ceylon	2,700	1,215
Total	1,583,882	702,190

As the total in 1892 was 1,894,735 tons, there was a decrease of 310,853 tons.

Export of wool in 1893.

Countries to which exported.	Greasy.			Washed.		
	Bales.	Weight.	Value.	Bales.	Weight.	Value.
		Pounds.			*Pounds.*	
Victoria	8,007	3,199,059	£105,088	140	39,740	£1,955
Great Britain	55,607	21,454,419	648,537	6,640	1,814,425	92,728
Total	63,614	24,653,478	753,625	6,780	1,854,165	94,683

	Bales.
Total greasy and washed	70,394
Total for 1892	61,995
Increase	8,399

Export of coke in 1893.

Countries to which exported.	Quantity.	Value.
	Tons.	
New Zealand	80½	£115
New Caledonia	747	944
Victoria	49	50
South Australia	750	876
Total	1,626½	1,985

The export of frozen meat in 1893 (to Great Britain) was: Carcasses, 112,263; haunches, 47,169; and cases, 1,116; valued at £40,358. The figures for 1892 were 186,420 carcasses, 38,525 haunches, 364 bags, and 506 cases.

Duty on American Bacon.—Under date of January 29, 1894, Mr. W. E. Quinby, minister to the Hague, informs the Department that in the Netherlands official organ—the Staats Courant—of the 29th instant, it is ordered that American bacon, which, like fresh or salt Australasian or American meat, is imported in large tins, and on being cut out is sold by weight, shall be classed under the heading "meat" of the tariff list, even though but a small quantity of pepper and pimento be used in the preparation thereof, and shall therefore be liable on importation to a duty of 1 florin (40 cents) per 100 kilograms (220 pounds).

Litholinite Admitted into Salvador Duty Free.—Mr. Alexander L. Pollock, consul at San Salvador, reports, under date of January 15, 1894, that by executive decree dated January 13 litholinite—a noncombustible material used in roofing and siding—is admitted free of duty into Salvador.

EXTENSION OF MARKETS

FOR

AMERICAN FLOUR.

CIRCULAR.

On December 5, 1893, the following circular was addressed by the Department to all consular officers of the United States:

You are hereby requested to prepare for publication reports upon "The Extension of Markets for American Wheat Flour."

The following interrogatories cover the principal points upon which information is desired:

(1) What is the standard of living in your district? Are the people ready to eat American flour?

(2) What quality of flour is most used?

(3) What quantity of American wheat flour was imported into your district in the year ending June 30, 1891?

(4) What quantity in the year ending June 30, 1892?

(5) What quantity in the year ending June 30, 1893?

(6) What quantity of American wheat each year during the same period?

(7) What quantity of wheat flour from other countries during the same period?

(8) What quantity of wheat from other countries during the same period?

(9) What is the import duty on American wheat flour?

(10) What is the import duty on American wheat?

(11) What is the import duty on wheat flour from other countries?

(12) What is the import duty on wheat from other countries?

(13) What are the facilities for monetary exchange?

(14) What are the facilities for shipping from the United States to your port?

(15) If there are any obstacles in the way of the extension of trade in American flour, what are they?

(16) What, in your opinion, are the prospects for doing a more extensive business in American flour in the country in which you represent the United States?

In answer to questions 3, 4, 5, 6, 7, and 8 consular officers at seaports will furnish official statistics, others will furnish estimates.

Questions 9, 10, 11, and 12 are to be answered only by the consul-general in each country.

BELGIUM.*

ANTWERP.

STANDARD OF LIVING.

The standard articles of food in the consular district of Antwerp are bread, potatoes, and beer.

QUALITY OF FLOUR USED.

Practically all the bread consumed in Belgium is made of wheat flour, which is largely manufactured in Belgium, though it is also imported from other countries, and principally from the United States.

The Belgian flour is milled from wheat grown in part in Belgium, but chiefly imported.

IMPORTS OF FLOUR AND WHEAT.

The following table shows the imports of flour at Antwerp for the calendar years indicated:

From—	1892.	1891.	1890.
	Sacks.	*Sacks.*	*Sacks.*
United States	285,400	334,585	211,806
Canada	5,646	15,001	....
Argentine Republic	24,002	3,436	27,715
India	27,771	4,704	1,694
Australia	226	280	4,160
Black Sea and Danube	2,827	13,598	7,339
Prussia and Pomerania	65,097	82,911	90,882
Italy	222	7,146	....
Hungary	160	1,440	....
Russia	....	50	954
Hamburg and Bremen	1,459	32,149	24,087
France	1,689	1,666	724
England	18,550	9,962	4,229
Total	433,049	506,928	373,590

It will be observed that the importation from the United States considerably exceeds that of all the others combined.

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* This series of reports was begun in the February number (161, p. 395) and continued in the March number (162, p. 495).

The following table shows the imports of wheat at Antwerp during the same years:

From—	1892.	1891.	1890.
	*Hectoliters.**	*Hectoliters.**	*Hectoliters.**
England	40,756	44,715	7,290
Black Sea country	41,699	1,570,212	1,226,473
Australia	16,108	24,319	30,316
Canada	125,897	93,304	....
United States	4,929,039	4,508,852	1,657,075
Denmark	....	5,218	130
Danube country	4,127,757	5,513,863	5,588,425
Egypt	200,749	427,190	229,956
France	3,391	7,796	9,704
Hamburg	47,594	3,608	....
Hungary	....	101,097	....
India	1,343,965	2,659,448	1,224,284
Pomerania	....	2,985	13,750
Prussia	625	68,719	53,403
Argentine Republic	2,162,020	2,631,866	1,823,834
Northern Russia	....	107,577	9,139
Turkey	127,764	226,007	318,092
Chile	....	37,715	....
Total	13,166,824	18,034,491	12,208,872

* 1 hectoliter=2.838 bushels.

All wheat and flour imported into Belgium are free of duty of any character.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are of the first order. The principal banks in the consular district of Antwerp are Banque Centrale Aurersoise, Banque d'Anvers, Banque Nationale, Banque de Crédit Commercial, Banque de Commerce, and H. Albert de Bary & Co., all of the city of Antwerp and all thoroughly reliable and of the first rank.

The facilities for shipping from the United States are the best. The Red Star line, the Wilson line, the Puritan line, and others, are, I should suppose, too well known to American exporters to necessitate details as to names, service, dates and places of departure, etc.

TRADE OUTLOOK.

The question as to American millers doing a more extensive business in this consular district and in the Kingdom of Belgium is not easily answered. The United States already furnish about three-fifths of all the flour coming to the port of Antwerp. This practically means Belgium itself, because Antwerp is the chief Belgian port, and it is not unfair to assume that the proportion will not be materially changed by such quantities as enter other Belgian ports.

Figures showing the relative consumption of Belgian-made flour and that of flour coming from other countries are not at hand. I learn that such figures exist, but my efforts to secure them have been unsuccessful. It is known, however, that the Belgian mills, notably those of Lourain, turn out large quantities of flour, and it does not seem probable that the importation of the American product can be materially increased without such inducements in the matter of price as would overcome the output of the Belgian mills. These mills are strong, long established, with ample capital, and work harmoniously.

The fact that the United States are now supplying three-fifths of the entire import would seem to indicate that organized effort on the part of American millers would result in a substantial and steady increase of their Belgian sales.

The retail flour trade would not be difficult to reach. As bread, cakes, pastry, etc., are almost entirely bought by the consumer from the baker, there is very little sale of flour to the family, and the necessity for every grocer to keep flour in small quantities does not exist as in the United States.

Many of these bakers use American flour, bought directly from the jobber, and the greater part of those who do not follow this custom buy directly from the Belgian miller.

The bakers, then, are the people to be reached, and a systematic, determined effort to that end would undoubtedly bring good results.

HARVEY JOHNSON,
Consul.

ANTWERP, *February 24, 1894.*

FLANDERS.

STANDARD OF LIVING.

The people of the two Flanders are divided by class distinction into three different groups—the nobility, the *bourgeoisie*, and the working people. Respecting the character of food eaten, the two first-mentioned divisions do not materially differ. They consume the best food which their means permit and which the markets afford. The opportunity to obtain a variety of articles is as good as, if not better than, in other parts of Europe. The market supplies here would be considered fair even in the United States. Owing, however, to the density of population, prices are higher than in other localities on the Continent.

The working people, in turn, consist of two classes—those residing in cities, mostly employed in factories, and those living in the country, engaged in agricultural labor. This consular district, composed of the two Flanders, is the center of vast industries. Fully one-third of the inhabitants of East Flanders are employed in factory labor. The proportion in West Flanders is not so large, but is at least one-fourth. These factory hands generally earn sufficient to feed and clothe themselves comfortably, but they never are able to indulge in the least luxury. Their nourishment consists chiefly of potatoes, vegetables, soup, and bread. Fish also is greatly used, but meat in very small proportion. The price of all kinds of food consumed by this class is cheaper, and often the quality is second or third rate. Even among domestic servants a partial custom is prevalent to give them different food from that eaten by the family. It is frequently of inferior quality.

The agricultural laborers probably fare the worst. Their food consists mostly of potatoes, considerable bread, and large quantities of buttermilk. Meat is very rarely eaten. That eaten is only the smoked fatty portions of pork which they are able to procure. They generally hire out by the day, week, or month for a certain sum in addition to their daily food supply. A field laborer earns about 75 centimes (15 cents) per day, with his food added. Their condition has, however, vastly improved in the past few years.

QUALITY OF FLOUR USED.

In every respect there is much less variety existing among people of the same means than in the United States. If you belong to a certain class, you will eat the same as your fellows. All bread is made by bakers. It is exceptional to bake bread or biscuit in one's own kitchen. The baker supplies all and always of uniform character. There is as much style in bread as in dress. What your neighbor eats, you must eat. At Ghent this fact is particularly true. Questions of politics and of bread are mixed. There are in this city three large coöperative bakeries known as "Vooruit," "Volksbelang," and the "Etoile du Nord." They supply three-fifths of the bread consumed. If you are a socialist, you will buy your bread from the "Vooruit;" if an antisocialist, from the "Volksbelang;" and if you wish to hide your political affiliations you patronize the "Etoile du Nord."

There are, of course, numerous private bakers, but none of great importance. Their clientage is composed of the richer classes, of their particular friends, and of transient trade. The bread furnished by the coöperative societies is probably as good as that made by the private bakers and sells for about two-thirds of the price asked at the smaller shops.

It may generally be said that the people eat mostly wheat bread, though there is some little brown bread used. In the villages the proportion is half wheat and half rye bread. In the country people generally eat rye bread, but frequently the farmers used bread made of a flour resulting from the grinding or crushing of wheat without any further cleansing or preparation. In the cities the *bourgeoisie* consume little bread, not exceeding daily one pound per individual. A workman eats at least 2 pounds of bread per day. The quality of the flour employed by the coöperative societies is mostly 00 (double zero), which is a good mean. The bread manufactured from this brand is sold by these societies at 18 to 20 centimes (3½ to 4 cents) per loaf of one kilogram (2 pounds). The private bakers use a better quality of flour, worth 1 to 3 francs (20 to 60 cents) more per sack of 100 kilograms (200 pounds) and sell the bread at 26 to 32 centimes (5 to 6½ cents) per loaf of 2 pounds.

All conditions being equal, the bakers are inclined to use native flour, even though the quality of bread, in our opinion, may not be as good. The people, of course, do not know what they eat; for them it is a matter of indifference, provided the price is reasonable and the bread to their taste.

The Belgians are ready to use American flour if it is good and the price is advantageous. Both the "Vooruit" and "Volksbelang" replied in these terms. The other society did not answer my communication. According to their own statement, the "Vooruit" employs 30,000 sacks of 100 kilograms per year, and the "Volksbelang" 70,000 sacks. The third society is not so important. Both of the former have assured me that they are willing and ready to treat directly with American houses. The "Volksbelang" supplies bread daily to 45,000 people, the "Vooruit" to 25,000 persons. It seems to me that it would pay Americans to open direct correspondence with both these important coöperative societies of Ghent.

The quality of flour most used is that known as "00 native," selling at 17 francs wholesale and 18 francs retail per 100 kilograms. Whether or not sufficient wheat flour is produced in Belgium for consumption is an open question. It is, however, a fact that large quantities of wheat flour from abroad are imported. American flour is chiefly used for whitening the native product. Most of this flour for sale at Ghent comes from St. Louis and Minneapolis. The "Patents" and "Imperial" are generally preferred. American flour is the most employed after the native product. The wheat flour coming from Hungary is used largely, but only for pastry and the finer baking. Bakers agree that American flour is better for working, and that the same quantity produces more bread; for instance, 100 kilograms of American flour is said to produce 4 more pounds of bread than the same quantity of any other flour. Double zero (00) native produces 125 to 133 kilograms of bread to 100 kilograms of flour.

IMPORTS OF FLOUR AND WHEAT.

It is impossible to answer any of the questions relative to the statistics for this district, inasmuch as no separate record is available for information. All wheat and flour coming to Belgium from the United States enters this country by way of Antwerp; consequently its tables of statistics include all Belgium. Furthermore, the last figures available are for the year 1892. The classification given to these two subjects in the "General Statement of Commerce with Foreign Countries," from which the annexed tables are composed, is: "Wheat, spelt, and meteil" and "flours, brans, food feculæ, and meslins of all kinds." "Meteil" is a mixture of wheat and rye. There are not, to my knowledge, any more exact statistics to be obtained. The tables hereafter given indicate the quantities in kilograms of 2.205 pounds and the values in francs of 19.3 cents. The figures of imports include only the amounts which have been actually used in Belgium and those of exports only such as have been produced in this country. Wheat or flour simply in transit is not included.

Table A shows the amount of importation of grain of all kinds from abroad into Belgium. It will be noticed that the countries from which grain now chiefly comes are the United States, Roumania, and the East Indies. Russia, which five years ago furnished the largest quantity, now supplies less than one-sixth its former amount. Roumania, our chief competitor, supplies less now than five years ago, while the East Indian statistics show fluctuation. The quantity imported from the United States, it is gratifying to observe, has steadily increased. A curious item is that, while the amount supplied by the United States in 1892 was one-fourth more than in 1891, the value was much less.

Table B shows the importation of flour of every kind. Here we see that the trade of the United States has increased enormously during the past five years, until now it holds first place. At one time Holland supplied the most and later France. France is now our chief competitor. Indeed, this competition is the more likely to succeed, as the French Government itself aids and assists this trade by law and by a drawback of 1.50 francs (30 cents) for every sack of 100 kilograms exported. The fact is also apparent that though the amount of American flour imported has increased, the value has not risen in proportion.

Tables C and D show, respectively, the total importation and exportation of wheat and grain into and from Belgium. From these tables it is to be learned that, although Belgium produces a great quantity of grain, it does not suffice for the needs of the people, as the importations constantly exceed the exportations. The difference proportionally, however, is growing less yearly.

The next two tables (E and F) indicate the importation and exportation of flour of all kinds. Here it is seen that the exports show generally an excess in quantity over the imports, but, strangely, a less valuation. Considering these tables with the two preceding, it is evident that a portion of the excess of wheat imported is manufactured into flour and leaves the country under this new form.

Tables G and H are practically extracts of A and B, but show at a glance the amount and value of grain and flour imported into Belgium from the United States.

A.—*Importation of wheat, spelt, and meteil into Belgium.*

Country of origin.	Quantity.				
	1888.	1889.	1890.	1891.	1892.
	Kilograms.	*Kilograms.*	*Kilograms.*	*Kilograms.*	*Kilograms.*
United States	139,670,000	216,880,000	319,569,000	448,815,000	537,204,000
Roumania	454,116,000	471,337,000	420,382,000	429,932,000	300,656,000
East Indies	71,358,000	92,467,000	105,172,000	237,633,000	114,325,000
France	31,839,000	34,736,000	43,368,000	103,568,000	83,591,000
Russia	539,996,000	358,828,000	308,637,000	281,882,000	80,905,000
Holland	67,924,000	73,449,000	60,090,000	42,780,000	56,698,000
Brazil	14,042,000	2,379,000	35,706,000	27,948,000	32,464,000
Germany	....	27,354,000	18,635,000	30,782,000	17,209,000
England	18,059,000	6,469,000	12,685,000	13,822,000	10,431,000
Austria	9,988,000	4,648,000	2,799,000	13,350,000	5,304,000
Argentine Republic	39,525,000	19,495,000	146,584,000	148,144,000	4,709,000
Spain	74,000	82,000	656,000	107,000	1,131,000

Country of origin.	Value.				
	1888.	1889.	1890.	1891.	1892.
	Francs.	*Francs.*	*Francs.*	*Francs.*	*Francs.*
United States	24,019,000	35,876,000	56,001,000	95,902,000	88,918,000
Roumania	83,012,000	86,238,000	82,291,000	92,326,000	50,245,000
East Indies	13,555,000	17,563,000	21,009,000	52,243,000	19,361,000
France	5,592,000	6,252,000	7,843,000	19,065,000	13,492,000
Russia	77,980,000	59,980,000	54,016,000	54,752,000	12,703,000
Holland	11,977,000	13,025,000	11,215,000	8,220,000	9,307,000
Brazil	2,647,000	408,000	6,903,000	6,086,000	5,414,000
Germany	....	5,047,000	3,522,000	6,019,000	2,899,000
England	3,268,000	1,057,000	2,435,000	2,728,000	1,761,000
Austria	1,705,000	790,000	504,000	2,737,000	871,000
Argentine Republic	7,181,000	2,914,000	26,671,000	31,820,000	22,168,000
Spain	15,000	16,000	118,000	21,000	185,000

NOTE.—Entered for consumption; grain in transit not included.

B.—*Importation of flours, brans, food feculæ, and meslins of all kinds into Belgium (entered for consumption).*

Country of origin.	Quantity.				
	1888.	1889.	1890.	1891.	1892.
	Kilograms.	*Kilograms.*	*Kilograms.*	*Kilograms.*	*Kilograms.*
United States	6,933,000	8,868,000	24,946,000	20,442,000	26,620,000
France	17,685,000	32,109,000	32,989,000	43,494,000	24,117,000
Holland	21,862,000	21,915,000	21,147,000	15,533,000	13,931,000
Germany	....	13,546,000	12,076,000	11,035,000	6,561,000
Argentine Republic	1,635,000	294,000	1,735,000	715,000	4,709,000
East Indies	23,000	136,000	699,000	527,000	3,453,000
Roumania	1,836,000	3,254,000	580,000	619,000	1,781,000
Brazil	157,000	....	486,000	....	384,000
Russia	7,199,000	986,000	547,000	1,088,000	355,000
Austria	....	255,000	29,000	39,000	263,000

B.—*Importation of flours, brans, food feculæ, and meslins of all kinds, etc.*—Continued.

Country of origin.	Value.				
	1888.	1889.	1890.	1891.	1892.
	Francs.	*Francs.*	*Francs.*	*Francs.*	*Francs.*
United States	2,775,000	3,547,000	7,484.000	6,357,000	6,419,000
France	7,220,000	13,003,000	10,172,000	13,890,000	6,186,000
Holland	8,863,000	8,822,000	6,445,000	4,910,000	3,494.000
Germany	....	5,422,000	3,624,000	3,430,000	1,594.000
Argentine Republic	654,000	117,000	521,000	222,000	1,130,000
East Indies	9,000	54,000	210,000	163,000	189,000
Roumania	734,000	1,302,000	174,000	192,000	428,000
Brazil	67,000	....	146,000	....	92,000
Russia	2,915,000	394,000	164,000	337,000	85,000
Austria	....	102,000	12,000	9,000	82,000

C.—*Total importation of wheat, spelt, and meteil into Belgium (entered for consumption).*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	819,870,779	155,775.448
1889	766,587,033	145,652,000
1890	896,721,596	179,344.319
1891	1,416,686,457	311,671,000
1892	1,032,058,126	175,449,882

D.—*Exportation of wheat, spelt, and meteil from Belgium (grain in transit not included).*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	198,500,254	37,715,048
1889	187,198,677	35.567,749
1890	223,268,989	44,654,000
1891	458,307,513	100,828,000
1892	375,744,813	63,876,618

E.—*Total importation of flour, bran, food feculæ, and meslin into Belgium (transit trade not included).*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	75,126,938	30,050,775
1889	80,881,577	32,353.000
1890	94,997,858	28,499,357
1891	100,734,000	31,228,000
1892	85,409,831	20,498,359

F.—*Exportation of flour, bran, food feculæ, and meslin from Belgium (transit trade not included).*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	96,123,243	22,108,346
1889	87,928,081	20,223,459
1890	93,680,744	18,736,000
1891	110,526,169	22,105,000
1892	93,696,273	20,613,180

G.—*Importation of flour, bran, food feculæ, and meslin into Belgium (entered for consumption) from the United States.*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	6,933,000	2,775,000
1889	8,868,000	3,547,000
1890	24,946,000	7,484,000
1891	20,442,000	6,359,000
1892	26,620,000	6,419,000

H.—*Importation of wheat, spelt, and meteil into Belgium (entered for consumption) from the United States.*

Year.	Quantity.	Value.
	Kilograms.	*Francs.*
1888	139,670,000	24,019,000
1889	216,880,000	35,876,000
1890	319,569,000	56,001,000
1891	448,815,000	95,902,000
1892	537,204,000	88,918,000

OBSTACLES TO TRADE.

Every merchant whom I have addressed tells me that there is not any certainty of twice receiving the same quality of flour even under the same brand. The second lot purchased on the same conditions is always inferior to the first. Naturally, suspicions arise concerning the honesty of the American shippers. There has been given me, however, one explanation. It is said to be the custom of certain Belgian houses to purchase the old sacks, to fill them with inferior flour (sometimes native, sometimes foreign), and to place this article on the market under its original mark. Here is the first great obstacle. To secure immunity from all possible false pretenses, American merchants should send flour in such parcels or packages that the contents can not possibly be changed or the wrappers used a second time, thereby guarantying to the purchaser the inviolability of their brand.

The large indigenous production is naturally another competing influence. More than this is the proximity of French markets. Americans are not ready to give the credit usually desired. The merchants must pay in thirty days, while they receive their pay from the bakers only in sixty, ninety, or one hundred and twenty days. Again, bakers in this city pay for their flour largely in copper coin. The banks do not receive this coin, consequently there is not any method possible by which the merchants can remit to the United States. These terms—long time and partial payment in coppers—are conceded by Belgian millers, who consequently have a great advantage. American flour is also, according to the prevailing idea, too dry. In fact, it is seldom used alone, but only as a mixture with the native product. American merchants want to sell quantities at a time too large for this market. The bakers, generally speaking, with the exception of the coöperative societies, have not the means of storing it. To secure a trade the seller must be ready to sell in small quantities without the mediation of agents and to deliver the purchases regularly. Again, the price of American flour is generally higher than others. While a difference of opinion exists, it seems that to the Belgian idea its possible superiority does not compensate for the extra price. From the tables it is evident that much foreign flour is introduced into Belgium. The American article has a fair chance, but to successfully compete the price must be reduced. Whether the cost of transportation renders a further reduction in its price possible is a question which American millers must decide.

PRICES.

The prices of wheat flour have been as follows per 100 kilograms:

Quality.	February, 1892.	February, 1893.	February, 1894.
	Francs.	*Francs.*	*Francs.*
00.00	31.00 to 33.00	23.00 to 25.00	19.50 to 21.00
00	30.00	22.00	18.25 to 18.50
0	29.00	21.00	17.00 to 17.25
1	27.00	19.00	15.00
3	....	....	13.00

The above prices are to bakers. At the mills the merchants pay one franc per 100 kilograms less. Retail prices to-day are as follows per 100 kilograms:

Quality.	Price.	Quality.	Price.
	Francs.		*Francs.*
00.00	20.00 to 20.50	1	16.50
00	18.50	3	14.50
0	17.50		

The price of bread has likewise fallen. In 1891 the coöperative societies sold for 28 centimes per kilogram bread which they now sell for 20 centimes. The prices at the bakers are, respectively, 36 and 30 centimes.

AMERICAN AND BELGIAN WHEAT.

This branch of the subject is not so broad as the other portion of this report. In this district there are, I am informed, five large mills. Two very large establishments are situated at Deynze, not far from Ghent. The proprietors are Mr. Timmermans and Mr. De Volder. The three chief mills in this city are owned by Messrs. Bracq & Co., Epouse Blancquart, and Mr. Charles Aerts. All these mills are provided with the most recent machinery. The total combined capacity of the five is about 300,000 kilograms of wheat per day, valued at 42,000 francs. The wheat imported from the United States is mostly that known as Red Winter No. 2, recently selling in Antwerp at 14.38 francs per 100 kilograms. Other brands used are Kansas No. 2, Newport News, Walla, and California.

The Belgian harvest last year was very fair, and consequently the price of wheat has fallen. The finest quality of Belgian wheat comes from the district of Audenaerde and the province of Brabant. The total product of the harvest of wheat and rye in 1893 may be estimated at 13,500,000 hectoliters. The principal grain crops are wheat, rye, barley, and oats. The provinces of East and West Flanders are especially fertile, although among the most densely populated districts of the world.

SHIPPING AND EXCHANGE FACILITIES.

There is not any direct line of steamers or boats from any port of the United States, although vessels drawing 18½ feet of water can come through the Terneuzen Canal and discharge immediately in Ghent. Such a line from New York or Boston could be established on a paying basis, as there would never be lack of return cargo. The rag shippers would especially welcome such an enterprise. Wheat comes now from Antwerp to Ghent by water. Its transfer and carriage cost about 2 francs per ton. Flour, however is transported by railway, and the cost from steamer in Antwerp to warehouse in this city is much more, being not less than 5.50 francs per ton. If these extra costs were removed by direct communication by a regular line between our ports and Ghent, the price of wheat and flour could without doubt be sufficiently reduced to obtain a large trade for both these staples, not only in this district, but also in all the surrounding country, of which this city is the natural and nearest port.

As heretofore mentioned, the refusal of copper by the banks constitutes a great obstacle to the easy exchange of money. Aside from this fact, the facilities for exchange are equal to those in other parts of Europe. All drafts are via London. The chief banks here are the National Bank (branch), having other branches in all the principal towns of Belgium; the Bank of Flanders, the Bank of Ghent, and the People's Bank. There are numerous private bankers.

ACKNOWLEDGMENTS.

My authorities for the statements made in this report are Messrs. A. Brasseur-De Crom, Max Lubliner, and Jules Van den Abeele, grain and flour merchants of Ghent; Mr. Edward Parein, of Antwerp; Mr. E. Bracq, miller; Mr. E. Anseele, director of the Vooruit; Mr. De Smet de Naeyer, director of the Volksbelang; and Mr. J. Oxley. To all these gentlemen I wish to take this method of returning my thanks. The tabulated statistics showing the imports and exports of flour and grain are prepared from the "General Statement of Commerce with Foreign Countries" for 1892, published by the Minister of Finance.

HENRY C. MORRIS,
Consul.

GHENT, *March 8, 1894.*

LIEGE.

STANDARD OF LIVING.

The standard of living in Liege is as high as that in any other manufacturing city in which I have been. There are no very rich men here and few indications of extreme luxury, but the masses appear to be prosperous.

The regulation breakfast of a Belgian artisan consists of bread, butter, and coffee. At ten o'clock a similar repast is taken, and at noon he dines upon bread, vegetables, and pork. At 4 he again refreshes himself with bread and beer, and in the evening takes potluck with his family. When times are hard bread becomes the sole staff of life. Thus the effect of adversity is to increase the consumption of bread.

QUALITY OF FLOUR USED.

Dealers in grain and millers—the avocations are usually joined here—agree that American wheat is the best known to the trade, though they foster a local prejudice in favor of that which is home grown to enable them to mix their grain and sell flour at a larger profit. The pretense is made that, although bread from our flour is whiter and more appetizing, it lacks body and gluten.

IMPORTS OF WHEAT AND FLOUR.

The province produces about two-sevenths of the grain it consumes; three-sevenths come from the Danube, and the residue, or two-sevenths, from the United States.

The American wheat sells usually for 10 cents more per bushel than the Turkish or Russian, and the latter for as much more than the Belgian.

The bakers report four grades of bread in use—the superfine, the fine, the gray or mixed, and the black. The first is made from American wheat, with a little Belgian added, the second from Russian and native mixed, the third from the Belgian mixed with rye, and the fourth from rye alone. When work is abundant at least two-thirds of the bread consumed is white, but when labor is depressed only about one-half of it is pure. Of the black very little is eaten, except in times of great hardship. It is, however, fed in large quantities to horses and dogs. The cabmen all carry loaves, and when at rest are often seen slicing and feeding them to their horses.

The prices of bread are 3, 2½, 2, and 1¾ cents per pound for first, second, third, and fourth qualities, respectively.

Millers, merchants, and the public admit that American wheat is the best produced, and that but for the higher price at which it is sold it would possess the market. As it is, although no effort has been made to increase its sale, the demand for it has grown in the last five years at the rate of 10 per cent per annum. The province is so well supplied with mills that foreign grain finds a readier sale than foreign flour.

TRADE OUTLOOK.

In conclusion, I see no reason why the United States should not extend their cereal trade in Belgium. With a boundless domain of the best wheat-producing soil in the world, with a yield of grain unprecedented in both quantity and quality, and with unlimited capital for its manipulation and movement, they might easily control the markets of the world. Surely, with all our advantages, we should be able to deliver wheat in Antwerp as cheaply as either Russia or Turkey.

Why should not syndicates be formed and special agents appointed in all European cities—especially where grain is admitted free—of over 100,000 inhabitants?

NICHOLAS SMITH,
Consul.

LIEGE, *February 22, 1894.*

FRANCE.

MARSEILLES.

PENDING TARIFF LEGISLATION.

An increase in the consumption of American flour in Marseilles and France necessarily depends to a great extent on the outcome of tariff legislation now under discussion in the Chamber of Deputies. For this reason a report upon the subject has been deferred with the hope that an early conclusion touching this very important matter would, if it did not leave the American producer in possession of the meager footing already attained in this market, at least determine whether he has any status at all. The question is not yet decided, and what is said herein with reference to a possible increase of business at Marseilles is based upon the dubious hope that the extreme protectionists in the Chamber may not succeed in the enactment of the prohibitive duties which have been proposed.*

Leaving this contingency out of consideration for the moment, and looking at the situation from the standpoint of the American miller, there is no apparent reason why a limited quantity of his product should not find sale in the territory of which Marseilles is the center of supply.

STANDARD OF LIVING.

Marseilles is a city of nearly 500,000 population and is situated in a country that not only does not produce all the wheat it consumes, but whose mills likewise have not the capacity of an annual output equaling the annual consumption of flour. It is affirmed that the people of southern France

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*A report from the consul-general at Paris, received March 26, 1894, advises the Department of the passage of the new tariff on cereals. The new and old rates are given as follows in the consul-general's report, per 100 kilograms:

Description.	Old rates.		New rates.	
Wheat, spelt, and meslin:	*Francs.*		*Francs.*	
Grains	5	$0.965	7	$1.35
Crushed and boulanges (ready to grind, containing more than 10 per cent of meal)	8	1.54	11	2.12
Flours:				
At rate of extraction of more than 70 per cent	8	1.54	11	2.12
At rate of extraction of between 70 and 60 per cent	10	1.93	13.50	2.61
At rate of extraction of 60 per cent and under	12	2.32	16	3.09
Sea biscuit and bread	5	.965	7	1.35
Grits and oatmeal, pearled and hulled	12	2.32	16	3.09
Millet, ground and cleaned	....	....	6	1.16
Italian pastes (semoules and pates)	8	1.54	13	2.51

consume a greater quantity of bread per capita than any others of the world. Meats of all sorts are high in price and to the poor are in the nature of luxuries. Bread and the cheap wines of the country adjacent to Marseilles are the food and drink upon which the majority of the people subsist. The climate is pleasant—indeed, as compared to that in which the great American cities are located it might be looked upon as perpetual summer. By reason of this those who are in the habit of investigating such subjects declare that a man doing the work of an ordinary laborer might subsist well on a diet of bread and some of the cheap vegetables to be found here in all seasons, together with the wine referred to. It is certainly true that the proportion of bread consumed as compared to other active working centers, particularly in the United States, is excessively large; and whether tariff taxes are increased or lowered, at least for the moment, and until the French mills are able to supply the demand, a deficit remains to be filled from abroad. At most this deficit is not large, and, even without taking the element of legislation into consideration, the market is a restricted one and is competed for not only by Russia, Austria, and countries adjacent to France, but by Australia, as well as by the United States.

IMPORTS OF FLOUR AND WHEAT.

The following table is presented, indicating the total amount of flour imported into Marseilles for the years 1891, 1892, and 1893, with the different countries of origin:

From—	1891.	1892.	1893.
	Pounds.	*Pounds.*	*Pounds.*
Russia	705,540	588,940	....
Austria-Hungary	1,499,080	1,342,000	715,660
Spain	823,680	316,140	....
Turkey	661,320	....	....
Australia	732,820	487,080	....
United States	54,340	239,360	29,040
Algeria	3,073,400	1,449,800	1,650,880
Italy	....	....	113,960
Other countries	481,580	836,220	765,160
Total	8,031,760	5,259,540	3,274,700

It will be observed that this table shows a large decrease in importations from year to year during the period given, the imports for 1893 being but little more than one-third the total for 1891. It does not follow, however, that this decline will continue, or that the capacity of the domestic mills providing the supply of home flour has been enhanced in a proportion equivalent to this reduction of imports. An examination of the records shows that these imports have continually varied, viz: In 1882 the aggregate was 6,284,300 pounds, while in 1883 it fell to 2,040,540; in 1884 the amount was only 3,000,000 pounds, while for the succeeding year the record shows an increase to twice that amount.

A more important feature of this table is the decrease in American importations from 239,360 pounds in 1892 to only 29,000 pounds during the year just closed. A similar decrease occurred in the importations of American wheat, the aggregate for 1893 being but little more than half the amount for 1892, as will be observed by a reference to the following table:

Imports of wheat at Marseilles.

From—	1891.	1892.	1893.
	Bushels.	*Bushels.*	*Bushels.*
Russia	14,359,895	7,234,861	15,249,758
Turkey	3,368,933	4,093,122	2,006,810
India	3,954,346	2,135,767	2,823,714
United States	2,351,543	2,011,779	1,214,832
Other countries	5,447,670	5,169,458	3,189,243
Total	29,482,387	20,644,987	24,484,357

In view of our surplus of both wheat and flour, it is difficult to understand why there should be a falling off in the quantity of either disposed of in this market. The people are particularly friendly to America and Americans, so far as individual dealers and commercial bodies are concerned—I include by no means the protected miller or grain-grower—and are willing always to advance halfway in any effort to increase trade relations either in regard to breadstuffs or any other product of our country that might be successfully marketed in France.

EXCHANGE AND SHIPPING FACILITIES.

In the matter of monetary exchange the advantages are of the highest order, there being here a branch of the Bank of France and another of the Crédit Lyonnais, with perhaps thirty other well-founded financial institutions, many of them transacting a daily business with American houses through their correspondents at Paris.

Transportation facilities are exceptionally good, there being two steamship lines whose vessels leave each way monthly, plying directly between New York and this city; while there are nearly a dozen companies accepting freight from New York to Mediterranean points by way of England, where, however, transshipment is necessary. In addition to these there are any number of sailing vessels plying between Marseilles and various American ports, producing competition sufficient to enable the shipper to exact favorable rates in either direction at any season of the year.

OBSTACLES TO TRADE.

Many dealers have been interrogated concerning the popularity of the different brands of American flour that have been offered for sale in this market as compared to Russian, Austrian, and other foreign flours with which ours compete. It is urged by some that the American flour handled here is deficient in gluten, but it is generally agreed that the comparison of similar grades is by no means to the discredit of the American miller; and the latter, with a favorable comparative status already established, and, touching tariff exactions, standing on an equal footing with other nations, it seems would have against him only the element of distance, and consequently greater transportation costs. Whether or not the skillful application of new methods or other resources at his command can be made to overcome this obstacle his own experience will enable him best to judge. It seems reasonably certain that if he can reach this market on an equal footing with competitors in the matter of cost, he can hardly fail to meet with such success as the limited market affords. It would hardly pay to send here the finer grades of flour, by reason of the fact that these are used only for pastry purposes, for which flour from the white, beardless "Suzelle" wheat of Provence and Algeria is exclusively employed. For bread-making the market pretends to want the best; but here, as in other communities where baking is done exclusively at the public bakers, there is no demand for fine flours unless it is sold at the price of poor. The successful operator is he who sells the greatest number of kilograms for the smallest number of francs.

TRADE OUTLOOK.

The limited character of this market does not invite extensive operations in foreign flour, but the splendid location of this city as a distributing point for southern Europe could be utilized by the American milling trade as a base of supply for many communities outside of France.

The practical feature of these inquiries, however—"what are the obstacles in the way of an extension of trade" and "what the prospects for doing a more extensive business in American flour"—is absolutely dependent upon legislation now under discussion in the Chamber of Deputies, whereby it is proposed to increase the wheat duties from 5 to 8 francs per 100 kilograms and make the duty upon flour, already double that upon wheat, virtually prohibitive. If these proposals become law American flour can not be successfully marketed at Marseilles or elsewhere in France.

CLAUDE M. THOMAS,
Consul.

MARSEILLES, *February 12, 1894.*

GERMANY.

COLOGNE.

QUALITY OF FLOUR USED.

American flour would gladly be consumed by the population of this country if it could be sold cheap enough. Only small quantities of American flour come to this district, mostly for the purpose of mixing with lower qualities of German flour.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are the same as are usual between commercial countries.

Grain reaches this district from the ports of Antwerp, Amsterdam, and Rotterdam via the River Rhine. The cheapest way is via Rotterdam, as I am informed.

OBSTACLES TO TRADE.

American flour would, as already stated, find a ready market here if it could be sold cheap enough. The high duty on flour makes it nearly impossible for it to compete with German flour.

If the import duty on wheat flour were in proportion to that on wheat, it would be possible for American flour to compete successfully with German flour.

FRITZ SCHRÖDER,
Vice-Consul.

COLOGNE, *February 21, 1894.*

FÜRTH.

STANDARD OF LIVING.

This is largely a manufacturing district. The majority of the people are consequently factory employés, receiving as wages amounts ranging from about $2 to $6 per week. Considering these wages, it may readily be seen that the standard of living in this district can not be very high.

QUALITY OF FLOUR USED.

Among the working people or factory employés very little wheat bread is consumed. For breakfast only do they indulge in a luxury of this kind, while for the other two meals they content themselves with what is known here as "Schwarzbrod," a bread made wholly from rye flour. There is, however, a better grade of "Schwarzbrod" used by the better paid among the factory employés, as well as by the better class of the citizens generally. It is made from a mixture of wheat and rye flour. In this way a considerable quantity of wheat flour is consumed.

A part of the wheat flour thus used is grown here and the rest is either imported from Hungary or bought in Mannheim, the principal flour market in southern Germany. That bought in Mannheim is American flour, or supposed to be, but so far as I can learn, only about 2 cwts. of this flour are used here weekly, the great bulk of the wheat flour used in making both the "Schwarzbrod" and the white bread being imported from Hungary.

Upon careful inquiry, I find that the Hungarian flour costs about $2.37 per cwt., while that brought from Mannheim costs only about $2.05.

The dealers say that the Hungarian flour is more salable in this market, being regarded as better in quality than that brought from Mannheim. I presume that this Mannheim flour is an inferior grade or quality of American flour, but as to what grade it is I have no definite information.

TRADE OUTLOOK.

I see no reason, however, why American flour of a quality equal to that of the Hungarian flour should not sell just as readily in this market as the Hungarian. In the cities of Nuremberg and Fürth there are over 200,000 inhabitants, and I am quite confident that if proper steps were taken to introduce it here the trade in American wheat flour throughout the entire Kingdom of Bavaria might be very considerably extended.

H. C. CARPENTER,
Commercial Agent.

FÜRTH, *February 1, 1894.*

GREECE.

I have the honor to forward a report prepared by Consular Agent McDowall, of Piræus:

I am convinced there is no market in this country for American wheat flour under present conditions of communication between the United States and Greece. All goods imported from the United States must, for want of a direct line of steamships, come via British, French, German, or Italian steamers and be transshipped once or twice before reaching a Greek port at very heavy freight rates, considerable damage to goods, and much loss of time. As the Greek markets are too small for full cargoes of perishable goods, no one would ever try the experiment of bringing a full cargo of flour. Wheat flour is not largely imported into this district; the little that is imported is of the finest quality and is used by confectioners. It is shipped from Trieste and Odessa. With the exception of this imported flour, all the rest used is milled in the country.

Greece produces about half the wheat she uses; the remainder is imported from Russian ports on the Black Sea, the Sea of Azov, the Danube, and from Turkey. No American wheat or wheat flour has ever come to this port in my recollection.

STANDARD OF LIVING.

The standard of living (in reference to the consumption of wheat-flour bread per head of the population) is high. The people are doubtless ready to eat American flour if they could get it cheaper than that with which they are now provided and of equal quality.

All qualities of flour are used.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are good, so long as the money or bills are for francs or pounds sterling. Dollars, or bills in dollars, are not dealt in in this country to any extent, and considerable loss would ensue from drawing in them.

There are no direct facilities whatever of transport from the United States to this port.

OBSTACLES TO TRADE.

Want of direct communication and cost are the chief obstacles in the way of extension of trade in American flour. There are no prospects whatever, in my opinion, for doing any business at all in American flour in this country.

A. C. McDOWALL,
Consular Agent.

PIRÆUS, *February 20, 1894.*

PRICES.

Consul Horton (of Athens) adds:

The "finest quality" alluded to in Mr. McDowall's report is poor flour according to American standards, and retails here at 1.20 drachmas per oke, which, taking difference of exchange into consideration, amounts to about 5 cents per pound. The flour ordinarily supplied to consumers in this country is a very inferior article and costs less.

Perhaps Mr. McDowall's last statement is too sweeping and pessimistic. In other respects I should consider the information furnished by him as correct.

IMPORTS OF FLOUR AND WHEAT.

The latest statistics to be had are for the year 1892. During 1892 the following quantities of wheat flour were imported into Greece:

From—	Quantity.	From—	Quantity.
	Pounds.		*Pounds.*
England	87,472	Germany	11,088
Italy	4,312	France	30,372
Austria-Hungary	787,618	Total	1,429,185
Russia	313,790		
Turkey	194,533		

Wheat and a mixture of wheat and rye are given together in the statistics. In 1892 there were imported the following quantities of wheat and the mixture of wheat and rye:

	Pounds.
Roumania	52,976
Turkey	91,726,219.2
Italy	2,956.8
Russia	126,085,467.2
Total	217,867,619.2

DUTIES.

The import duty on wheat flour (American and other) is 11.95 francs ($2.30), or 15.80 drachmas, per 100 okes, the oke being 2.8 pounds. The import duty on all wheat, and the mixed wheat and rye, is 7.35 francs ($1.42), or 9.72 drachmas, per 100 okes.

Nations under special commercial treaties may import flour with a duty of 6.50 francs ($1.25), or 8.60 drachmas, per 100 okes; wheat and mixed wheat and rye, 4.11 francs (79 cents), or 5.44 drachmas, per 100 okes. No nation, however, has a special commercial treaty which includes flour or wheat.

E. ALEXANDER,
Consul-General.

ATHENS, *February 24, 1894.*

ITALY.

BOLOGNA.

In the provinces of Bologna, Ferrara, Modena, Reggio, Forli, and Ravenna, which comprise this consular agency, people do not make use of imported wheat flour, for the reason that the home production is sufficient for their wants. A small quantity of Hungarian wheat flour was formerly imported for the confection of cakes and the finest quality of bread, but the adoption of modern cylinder mills has put a stop even to this import.

In some provinces, such as Piedmont, Liguria, Lunigiana, Tuscany, and others in the north of Lombardy, the production of wheat is not sufficient for local consumption and some foreign wheat is imported, notwithstanding the fact that a great portion of the country people use maize flour.

The greatest competitor with American wheat in Italy is Russia, which sells its product at a very low price, owing to several reasons, viz, the low value of money in Russia, the cheap price of the soil (which in many localities is of almost incredible natural fertility), the low rate of wages paid to the laborers, etc.

The imports of the Russian product into Italy in 1892 amounted to 588,471 tons. American wheat is held in great esteem in Italy, principally "Red Winter" wheat, and it is gratifying to note that every year it is more in demand. During the year 1891 the import of American wheat into Italy reached only 935 tons, while in 1892 it amounted to 19,938 tons, which promises well for the future.

CARLO GARDINI,
Consular Agent.

BOLOGNA, *February 12, 1894.*

CASTELLAMMARE.

STANDARD OF LIVING.

The principal dietary in southern Italy consists of macaroni and other farinaceous food; and whether the people are ready to eat American flour, as asked in the circular, depends entirely on its fitness to be made into macaroni and whether it can be made into bread as cheaply as the home product. Given equal conditions of price, I believe American flour would be preferred, and if it can be sold in this market, after paying duty and calculating the loss on a debased currency, at less than Italian, Russian, or Indian wheat flour, it would certainly find a large demand and ready sale.

American grain is well adapted for making bread, and Michigan and California wheat—red wheat—is well adapted for macaroni, which requires specially hard grain.

In summer the poorer classes subsist chiefly on fruits, vegetables, and heavy, dark bread.

From 1860 to 1886 the general condition of the Italian people showed distinct improvement in regard to their consumption of cereal food, the years 1880 to 1886 marking the period of highest prosperity in this regard.

The rupture of commercial relations with France and a disastrous tariff war, which closed the doors to a profitable exportation of two of Italy's chief sources of profit—wine and fat cattle—have produced a disastrous effect on the prosperity enjoyed by Italy previous to that epoch.

A peasant's daily food up to 1880 generally consisted of Indian meal or rye bread, vegetables, beans, and chestnuts. Wheat bread was a luxury only indulged in on fête days or during times of illness. Public slaughterhouses existed only in a few of the great cities and fresh or salted fish was not to be had except, in most cases, when imported. Now, however, thanks to the general facility of communication on land and sea, people eat a large proportion of wheat in its various forms of macaroni and bread, and fresh, dried, and smoked fish is easily procured, even in the interior.

The regions that could be profitably served with American products through the ports of the bays of Naples and Salerno are five—the Abruzzi, Campania, Puglie, Basilicata, and Calabria.

The average amount of meat consumed by each individual in the above districts yearly is as follows: Abruzzi, 37⅔ pounds; Campania, 45 pounds; Puglie, 13½ pounds; Basilicata, 13½ pounds; and Calabria, 42¼ pounds.

There is a large profit made by the manufacturers of macaroni and bakers, for, notwithstanding the heavy fall in the price of wheat, its preparations are sold at little less than when wheat was nearly double its present price. For instance, wheat bread costs the buyer 35 centimes per kilogram, while grain costs less than 21 centimes per kilogram. To remedy similar abuses coöperative bakeries have been established in many provinces of northern Italy.

IMPORTS OF WHEAT AND FLOUR.

No American wheat or flour was imported during the years 1891, 1892, and 1893 at any of the three large ports within this consular district. The following table shows the quantity of grain and flour imported from other countries during the period mentioned:

Cities.	1890-'91.		1891-'92.		1892-'93.	
	Grain.	Flour.	Grain.	Flour.	Grain.	Flour.
	Bushels.	*Barrels.*	*Bushels.*	*Barrels.*	*Bushels.*	*Barrels.*
Salerno	212,821		280,056		693,756	20
Castellammare	5,384	4	7,952	4½		1¾
Torre Annunziata	1,634,808		3,148,647		3,058,023	
Total	1,853,013	4	3,436,655	4½	3,751,779	21¾

EXCHANGE AND SHIPPING FACILITIES.

The facilities for exchange are excellent, through bankers at Naples, by drafts on Paris or London.

This consular district has five ports, three of which are well protected and have fine harbors, viz, Salerno, Castellammare di Stabia, and Torre Annunziata.

Salerno—This port is situated on the gulf of the same name and was completed in 1888. It consists of a basin 35 acres in extent protected on the east by a breakwater 393½ feet long, extending south southeast from the shore, and on the west by another breakwater extending south for 393½ feet, south southeast 1,148 feet, thence running semicircularly 1,049½ feet east northeast until opposite the eastern breakwater, from which it is distant 328 feet, this forming the entrance to the harbor. The whole interior of the breakwater is lined by a quay on which are heavy columns for cables 26 feet apart. At the entrance the greatest depth of water is 21½ feet, and in some parts of the basin it is 23 feet; but the deepest part is near the breakwater to the south. The basin is well protected from all winds, but the entrance is difficult and dangerous in storms. The port is protected by two lighthouses, one at the end of the breakwater, a fixed red light visible 5 miles, and the other a fixed white light in the interior of the harbor opposite the entrance visible 4½ miles. The foreign commerce is carried on almost exclusively by English steamers, which import coal, American cotton, and grain from the Black Sea. The time allowed for loading or discharging steamers is as follows per day: Coal, 300 tons; grain, 200 tons. For sailing vessels it is: Coal, 60 tons; grain, 40 tons.

Castellammare di Stabia.—This port is situated in the Bay of Naples. The harbor is protected by a heavy stone breakwater extending to the north and, being situated at the base of a range of mountains 4,000 feet high, which rise directly from the sea, is protected from the southern or southwestern gales. A basin 49½ acres in extent gives good and secure anchorage to vessels of any size. Small vessels drawing from 10 to 18 feet can discharge directly on the quay, but larger vessels must discharge by lighters. The difference between high and low water is almost imperceptible, amounting to not more than 14 inches. Castellammare has two lighthouses; one is a dioptric fixed light, white, varied by three flashes every three minutes, visible 15 miles, and the other a red fixed light at the end of the breakwater, visible about 5 miles. The principal commerce of Castellammare is the importation of cereals for making macaroni, biscuits, bread, and alcohol. Rice for alcoholic purposes also is imported from Rangoon. Cereal products come from other parts of Italy, the Black Sea, northern Africa, and North and South America. Direct commerce is carried on with the ports of the Black Sea, Tripoli, Tunis, New York, Philadelphia, Bangor, Me. (shooks for orange and lemon boxes), Buenos Ayres, Rangoon, etc. Coal and iron are also imported from Great Britain and Marseilles. The usages of the port allow eight days for loading or discharging vessels under 100 tons; for vessels of 100 to 1,000 tons, fifteen days; and twenty five days for those over 1,000 tons.

Torre Annunziata.—This port is south southeast from the cone of Mount Vesuvius and is 4 miles from the town of Castellammare. It has developed extraordinarily within the last few years, at the expense of Castellammare. The basin is inclosed by two breakwaters of stone—one to the east, 886 feet long, and the other to the west, extending 2,919 feet. Both of these sea walls start from the shore at a distance one from the other of about 1,640 feet, and the width of the harbor's mouth is 1,213 feet, the inclosed space forming a protected basin of 61¾ acres. The breakwaters are strengthened by broad quays, which extend around the harbor, one side containing a railway track. The depth of water permits large steamers to discharge directly on to the quays, but not into the freight cars. At the entrance the depth is 29½ feet and varies from 23 to 26 feet in the basin, except close in shore, where it is 10 feet. The harbor is well protected from sea and wind. There are two lights, one at the end of the western breakwater, a fixed white light of sixth order, visible 8 miles, and the other a port light, green, and visible one mile. The commerce of Torre Annunziata is made up almost entirely of the importation of grain for macaroni, which comes from the ports of the Black Sea and India. The port is directly connected by rail with the lines of Gragnano, Castellammare and Naples. It is on the direct route between Naples and Brindisi, by which it is placed in direct communication with the network of railways of southern Italy.

OBSTACLES TO TRADE.

The only obstacle to trade in grain and flour from the United States is the competition of low-priced grain from the ports of the Black Sea and their proximity to this market. For some reason no wheat from the United States has been imported here for many years, yet the macaroni manufacturers at Torre Annunziata tell me that they never had better grain for their purpose than the American red wheat, known, I believe, in the United States, as Mediterranean wheat.

TRADE OUTLOOK.

My opinion is that this region offers unusual advantages for the importation of American red wheat, because, as mentioned, it is superior to all others for macaroni.

There are 87 flour mills in the district of Castellammare di Stabia and 213 macaroni-paste manufactories at Gragnano and Torre Annunziata, which turn out on an average 65,726,760 pounds per year, worth $2,308,716, of which nearly 20 per cent is exported to the United States.

In the province of Salerno flour is manufactured in 139 communes at 631 mills, of which 3 are worked by steam and 628 by water power.

Italian paste manufacture, under its various forms of macaroni, is carried on in 27 communes, and 164 factories are employed in the business, which give employment to 1,288 men, 336 boys, and 3 women, in all 1,627 persons. The annual production exceeds 23,100,000 pounds, worth about $810,000.

Although there would undoubtedly be a large demand for American grain in this district, on account of the important quantities required for macaroni manufacture, the great abundance of Russian grain, forced to seek a market at any price, is a serious competition.

Italian exporters of macaroni receive a drawback on that made from foreign grain.

HENRY GREENOUGH HUNTINGTON,
Commercial Agent.

CASTELLAMMARE, *January 31, 1894.*

CATANIA.

STANDARD OF LIVING.

The bulk of the people, the working classes in particular, live nearly exclusively on bread of good, but second, quality, made of semolina. They are not ready to eat American flour, because flour is very little used in this city and province for bread-making purposes, except a small quantity for making soft bread. The quality most in use is that obtained from soft wheat (Majorca and Russian Ghirka), ground especially to obtain the little needed for soft bread (French bread) and biscuits.

IMPORTS OF WHEAT AND FLOUR.

No American flour was imported in 1891–'93, nor American wheat in 1891 or 1892. In 1893 there were imported 600,132 kilograms of wheat from the United States.

Imports of wheat and flour at Catania from countries other than the United States.

From—	1891.	1892.	1893.
Flour.	*Kilograms.*	*Kilograms.*	*Kilograms.*
Austria-Hungary	3,700	3,200	1,867
Italy	411,570	1,236,085	765,101
Total	415,270	1,239,285	766,968
Wheat.			
Russian	10,520,424	29,369,916	44,616,928
Turkey	4,182,335		
Italy	260,250	241,605	134,165
Greece			566,816
Total	14,963,009	29,611,521	45,317,909

EXCHANGE AND SHIPPING FACILITIES.

Cargoes of wheat are usually paid for, immediately after being unloaded, in Italian paper currency, with 2 per cent discount, or by three months' acceptance from date after delivery. This last method of payment, however, is granted to purchasers only where the American shipper has a local agent.

From winter to spring there are plenty of English vessels here to take cargoes of green fruit to the United States. These vessels very seldom find return cargoes, and are therefore compelled to return in ballast, save when they go to load at New Orleans or Savannah, which happens very seldom. In view of this condition of affairs, steamers to take grain from the United States to Italy should be easily found, and at reasonable freight rates.

OBSTACLES TO TRADE.

The principal obstacles to the introduction of American flour into this province is the fact that almost all the bread consumed here is made only of "semolina." Flour is used in small quantities by confectioners and for making a limited quantity of soft bread, suitable to the taste of foreigners visiting this island.

The prospect for the enlargement of the American flour trade here is not good on account of the limited quantity of flour used, but American flour can find a large market in middle and upper Italy and Milazzo, where it is used exclusively for bread-making purposes.

AUGUSTUS PERATONER,
Acting Consul.

CATANIA, *February 10, 1894.*

FLORENCE.

QUALITY OF FLOUR USED.

Flour is undoubtedly the staple article of consumption, and the Tuscan people would be but too glad to use the American article. That mostly used is: *Nostrale*, of this country; *gentile*, or soft wheat; *ferrarese*, or Ferrara; and Hungarian, used for fine bread.

IMPORTS OF WHEAT AND FLOUR.

No American wheat or flour was imported into this district during the three fiscal years ending June 30, 1893.

Bombay and Odessa wheat flour, and especially hard Russian wheat from the Black Sea for semoule, were on this market previous to the assessment of a duty of $1 per 2.838 bushels.

The following table shows the quantity of flour entered at Florence, with the amount of octroi duty (city duty) collected:

Year.	With semoule.	Without semoule.	Octroi duty.
	Bushels.	*Bushels.*	
1891	126,475,184	172,383,239	$73,404.38
1892	125,987,309	174,342,428	73,826.19
1893	128,616,503	186,413,691	77,632.28
Total	381,078,996	533,139,358	224,862.85

EXCHANGE AND SHIPPING FACILITIES.

The monetary exchange is perhaps the only drawback to the introduction of American wheat flour. The actual rate of exchange is now about 14 per cent.

Shipments of foreign goods are usually cleared at the seaports of Genoa, Leghorn, Venice, and Naples. This explains also why no record of imports can be obtained from the local custom-house.

TRADE OUTLOOK.

American merchants dealing in wheat or flour contemplating exports to Italy ought to be able to sell wheat at $2.50 per 2.838 bushels, in order to compete with the actual market price of $4.05. In fact, $4.05 is the price of 2.838 bushels at the railway station in the city of Florence, or $3.96 at Leghorn, Venice, Genoa, or Naples, of which $1.60 is calculated for duty and incidental expenses, and 30 cents for actual depreciation of American flour in competition with other flour, making the net price, in currency, at Leghorn $2.50.

American red winter wheat, in my opinion, will eventually become as popular in Italy as American petroleum, which competes successfully with the Russian article. As soon as the financial interests of Italy shall have reached a more normal condition and the premium on gold shall have been greatly reduced, there will be an excellent opportunity to introduce the American red winter wheat in Italy, into which 16,000,000 bushels of wheat are imported annually. It is, however, but right to state that it is believed that the Central Government is now considering the possibility of adding an additional duty on imported wheat. Should the Government take such action, it would make a considerable increase in the cost of the American article in Italy.

C. BELMONT DAVIS,

FLORENCE, *February 3, 1894.* *Consul.*

GENOA.

STANDARD OF LIVING.

The principal food of the people is wheat flour, the product of Italian mills, but they are ready to eat any brand of flour, no matter where it comes from, provided it is as good and costs no more than the Italian brand.

IMPORTS OF FLOUR AND WHEAT.

The commercial statistics recorded and published annually by the Genoese Chamber of Commerce are wholly for each calendar year. It is therefore impossible to give facts and figures for the years ending June 30 of each year, as required by the Department. Statistics for any given year are not published until about the close of the next following year. Thus, for instance, the statistics for 1892 were not ready for public inspection until December 5, 1893.

No American flour was imported in 1891 and 1892. American wheat to the amount of 39,339,222 pounds was imported in 1892; none in 1891.

Imports from other countries.

From—	1891.	1892.
Flour.	*Pounds.*	*Pounds.*
Argentine Republic	11,687	
Austria-Hungary	1,801	
European Turkey	1,541	
England		379
Germany		31,837
Total	15,029	32,216
Wheat.		
Argentine Republic		20,301,339
France	32,594	
Russia	342,578,685	423,751,121
European Turkey	21,895,317	50,218,951
Asiatic Turkey	18,490,215	
India	70,717,756	46,540,725
Tunis	80,747	
Egypt	335,610	395,947
Total	454,130,924	541,208,083

EXCHANGE AND SHIPPING FACILITIES.

The general practice among Genoese importers for many years past has been to have an open credit in London and Paris banks in favor of the exporter. Among well-known business houses here, as elsewhere, special arrangements are made between buyer and seller for payment of bills in lieu of drawing on deposits in the hands of foreign bankers.

There are two regular lines of steamers—the Hamburg-American Packet Company and the North German Lloyd Company—plying now between the ports of New York and Genoa. There are also many freight steamers and sailing vessels constantly plying between the ports of Genoa and the different ports of the United States. The records show that in the year 1893 ninety-seven bills of health were issued at this consulate to vessels clearing this port for the United States.

OBSTACLES TO TRADE.

The chief obstacle in the way of the extension of trade in American flour is the high duty imposed by the Italian Government on this necessary article of food. This high duty is levied for the purpose of protecting the national flouring mills.

TRADE OUTLOOK.

The prospect is not at all favorable for the sale of American flour in this section of Italy at the present moment, unless the American brand can be sold in this market as cheaply as the Italian flour.

JAMES FLETCHER,
Consul.

GENOA, *February 22, 1894.*

LEGHORN.

QUALITY OF FLOUR USED.

The flour in general use here for making bread comes from Bologna, Florence, and Pistoja, where there are numerous steam mills. It is made of Italian wheat, which is soft. The flour used for making pastes (vermicelli, macaroni, etc.) is manufactured from hard wheat, coming principally from Russia and the Black Sea ports. Such hard wheat is ground here in steam mills, which employ 600 men and have an output of 154,000 pounds per day.

IMPORTS OF FLOUR AND WHEAT.

No American wheat or wheat flour was imported into this district during the three years ending June 30, 1893. The quantity of wheat flour imported from other countries amounted to 1,230 pounds in 1891 and to 35,747 pounds in 1892. The statistics for 1893 are not available.

The imports of wheat from foreign countries other than the United States amounted to 837,607 bushels in 1891 and to 1,205,582 bushels in 1892.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange, through private bankers and money-exchange brokers, who buy and sell according to quotations ruling at the bourse at Paris, are ample.

Shipping facilities are very good, but no steamship company except the Anchor line seems inclined to make Leghorn a direct port of arrival and departure from and to the United States. Even the steamers of the Anchor line run very irregularly, to the discomfiture of the shippers, who are sending their shipments from here to Genoa for transshipment to the United States. In some instances, however, shipments are sent to Liverpool by English steamers, and thence transshipped to the United States. If this state of affairs does not change, the era of decadence is at hand, and Spezzia will wrest the palm from Leghorn as the port of entry and departure. I am informed that the English, German, French, and Austro-Hungarian governments have consuls stationed at Spezzia already, probably in anticipation of future developments.

TRADE OUTLOOK.

Under present circumstances the conditions are very favorable for the introduction of American flour. "Ex-State Shipping Brand" is quoted to-day in New York (as I notice in the newspaper cable report) at $2.15 per barrel of 196 pounds—*i. e.*, 11.15 francs for 88½ kilograms, or 12.70 lire, (francs command 14 per cent premium to-day). Hence the price of 100 kilograms would be 14.35 lire, which, with 2 lire added for transatlantic freight and insurance, would amount to 16.35 lire, national and octroi duties not included.

One hundred kilograms of flour, similar in quality to such "Ex-State," command 28 lire at the mills of Bologna, Florence, or Pistoja; the freight hither (to railway depot at Leghorn) is 1 lira per sack of 100 kilograms.

I would not, under any circumstances, advise the shipment of flour in barrels; it should be shipped only in sacks of 100 kilograms (220 pounds avoirdupois) gross, *i. e.*, including the weight of each sack.

ALEXIS ROSENTHAL,
Consul.

LEGHORN, *February 21, 1894.*

PALERMO.

STANDARD OF LIVING.

Bread and macaroni made from wheat flour are the principal articles of food in this consular district. There is a market here for wheat itself, but the flour used here is quite different from the American product.

QUALITY OF FLOUR USED.

The flour most used is made from Sicilian and foreign grain mixed, one of the former to two of the latter. There are seven flour mills in Palermo. All of the flour that is consumed here is made here; practically no foreign flour is used.

IMPORTS OF FLOUR AND WHEAT.

There was no American flour or wheat imported during the years under consideration. The imports from other countries were as follows:

Year.	Flour.	Wheat.
	Kilograms.	*Kilograms.*
1891	216	7,703,271
1892	7,774	6,658,425
1893	4,888	25,702,479

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange are good, there being several banks in the city.

The facilities for shipping from the United States to this port are good. Fruit steamers leave the principal ports nearly every week, sometimes returning here almost in ballast. A fair cargo would insure their returning directly here.

OBSTACLES TO TRADE.

American wheat coming to this market would have to compete with Russian or Black Sea wheat, as it is called. Foreign wheat is said to be unsuitable for making macaroni, because the dough or paste from which it is made requires a hard grain, so that it can be worked to advantage; it is for this reason that Sicilian is mixed with foreign grain.

TRADE OUTLOOK.

Dealers in wheat or flour, or in anything else, for that matter, can not be successful in finding a market for their goods unless they send capable agents here to represent them who speak the Italian or French language. It must be remembered that English, French, and German dealers have a great advantage over the American dealer, simply because they have realized this fact and have their agents here.

WM. H. SEYMOUR,
Consul.

PALERMO, *February 20, 1894.*

ROME.

STANDARD OF LIVING.

In the rural districts the standard of living is moderate. Wheat flour is the chief article of diet of the laboring class, either as bread or macaroni. In Sicily I have heard laborers say that American flour is too "fine;" that for hard work they required coarser food; that American flour was not as nourishing as flour of their own manufacture. The laborer prefers a flour not so finely bolted as our American flour. The consumption of wheat flour is also very large in the towns, where American flour is justly appreciated.

The price of bread to-day in Rome is: For superior quality, $4\frac{3}{5}$ cents per pound; for first quality, $3\frac{1}{2}$ cents per pound; for second quality, $3\frac{3}{16}$ cents per pound; for third quality, $2\frac{3}{5}$ cents per pound.

The mean price of wheat bread in Italy for the past three years has been, per pound: In 1890, $3\frac{1}{2}$ cents for first quality and 3 cents for second quality; 1891, $3\frac{3}{4}$ cents for first quality and $3\frac{1}{10}$ cents for second quality; 1892, $3\frac{4}{5}$ cents for first quality and $3\frac{1}{4}$ cents for second quality.

The consumption of wheat throughout the Kingdom of Italy is expressed by the following figures:

Year	Total consumption.	Population.	Consumption per capita.
	Bushels.		*Bushels.*
1890–'91	127,145,700	30,158,408	$4\frac{1}{5}$
1891–'92	134,103,035	30,347,291	$4\frac{7}{16}$
1892–'93	130,658,238	30,535,848	$4\frac{3}{16}$

ITALIAN AND FOREIGN WHEAT.

The amount of Italian wheat remaining for consumption after deducting enough for seeding, together with the amounts of foreign wheat purchased for consumption during the years under consideration, are shown in the following table:

Year.	Italian.	Foreign.
	Bushels.	*Bushels.*
1890–'91	109,109,000	18,036,333
1891–'92	118,622,000	15,282,666
1892–'93	87,171,583	36,820,666

QUALITY OF FLOUR USED.

The quality of flour most used is that designated as No. 2. It costs today (February 1, 1894) at wholesale 34 francs per quintal, or 3 cents a pound, cost of transportation deducted, but including consumption, or octroi, tax.

IMPORTS OF WHEAT AND FLOUR.

During the three fiscal years 1891, 1892, and 1893 no wheat flour was imported directly from the United States into the district of Rome; and during the three calendar years 1890, 1891, and 1892 but 48 quintals of wheat flour (year 1890) were imported directly from the United States into Italy.

No American wheat was imported directly into the district of Rome during the fiscal years 1891, 1892, and 1893. The total direct importations of American wheat into Italy for the years 1890, 1891, and 1892 were as follows:

	Bushels.
1890	4,340
1891	34,300
1892	731,060

The quantity of wheat flour imported directly into the district of Rome from foreign countries for the calendar years 1890, 1891, and 1892 (no figures are available for the years ending June 30) is given in the following table:

Country.	Quantity.		
	1890.	1891.	1892.
	Pounds.	*Pounds.*	*Pounds.*
Austria	22,000	....	440
Germany	....	132,638	....
Great Britain	127	....	....
Russia	17	....	....
Turkey	....	....	77
Total	22,144	132,638	517

The following quantities of wheat were imported directly into the district of Rome from foreign countries other than the United States—calendar years:

Countries.	1890.	1891.	1892.
	Pounds.	*Pounds.*	*Pounds.*
Russia			3,721,592
Greece	206,514	110	
Total	206,514	110	3,721,592

The following table shows the quantity of wheat imported into Italy from foreign countries other than the United States—calendar years:

Countries.	1890.	1891.	1892.
	Quintals.	*Quintals.*	*Quintals.*
Austria-Hungary	26,750	21,040	10,070
France	17,690	14,150	18,310
Germany	1,040	250	
Great Britain			6,010
Greece	58,180	41,020	13,680
Malta	990		1,510
Roumania	619,080	300,290	428,540
Russia	4,630,450	3,097,920	5,247,750
Spain	5,010		630
Turkey in Europe	97,600	597,910	435,370
English possessions in Asia	120,310	442,090	378,230
Turkey in Asia	780,630	52,570	110,690
Egypt	12,430	5,140	16,280
Tunis	52,350	15,210	7,730
Algeria			4,410
Brazil		3,190	310
Argentine Republic	21,170	43,540	
Uruguay	5,010		92,570
Total	6,448,690	4,634,320	6,772,050

The following table shows the quantity of wheat flour imported into Italy from foreign countries other than the United States—calendar years:

Countries.	1890.	1891.	1892.
	Quintals	*Quintals.*	*Quintals.*
Austria-Hungary	8,017	6,551	6,977
France	37	146	
Germany	102	806	155
Great Britain	71		
Greece			135
Spain	99		
Russia	66		165
Switzerland		139	
Turkey in Europe			33
Algeria	59		
Tunis			48
Argentine Republic	295	56	
Brazil	628		
Total	9,374	7,698	7,513

DUTIES.

The import duty on wheat flour from all countries is 8.70 lire per quintal, or three-fourths of a cent per pound; the import duty on wheat is 5 lire per quintal, or half a cent per pound.

EXCHANGE AND SHIPPING FACILITIES.

Facilities for monetary exchange are by means of international post-office orders and drafts on London or Paris.

The facilities for shipping from the United States to Italy are good—by the Hamburg-American and North-German Lloyd steamship lines weekly from New York and by the Italian steamship line, the Navigazione Generale Italiana.

OBSTACLES TO TRADE.

The table giving imports of wheat flour into Italy for the years 1890, 1891, and 1892 shows the amounts imported to have been small. Italian flour and Italian-grown wheat are protected by import duties of three-fourths of a cent and one-half a cent per pound each, respectively. There is comparatively but little demand for Italian wheat, due to the exportation of flour from Italy. This statement at first sight appears absurd, but the following explanation will make it clear:

The Italian law permits the exportation only of the products of grain imported into the country. If the mill-owners exported only the product of the imported foreign grain, there would be nothing to say. The question naturally arises, how is it that Italian mills grind for export? The answer is that even with the old system of mills, 100 pounds of wheat yield 74 pounds of No. 1 flour fit for bread, 9 pounds of low-grade flour (No. 2), 18½ pounds of bran, and half a pound of refuse. The low-grade flour (No. 2) is bought up at all the small mills that grind only Italian wheat. By adding together all the amounts gathered up of flour No. 2, the sum total would not equal the amount in reality exported; but to flour No. 2 are added rye and corn flour, both well adapted to the mixture. Special machines are used in making this mixture. The miller then presents himself at the frontier custom-house with an article composed of 74 per cent of flour, 24 per cent of bran, and 2 per cent of refuse, and he has returned to him 5 lire on every quintal as a drawback on the foreign wheat supposed to have been imported by him. In this way flour No. 1 remains in Italy without having paid a cent of duty. This law is certainly an obstacle in the way of the extension of trade in American or any other foreign flour.

TRADE OUTLOOK.

I regret to say that I do not see any immediate prospect for doing a more extensive business in American flour in Italy, as just now there is a very important movement on foot to induce the Italian Government to still further protect both Italian wheat and Italian flour by increasing the import duties.

WALLACE S. JONES,
Consul-General.

ROME, *February 19, 1894.*

SPAIN.

SANTANDER.

The people of the district are very poor. Bread made from Spanish maize is their principal food, although they are rapidly becoming accustomed to wheaten bread. The flour comes mostly from the neighboring districts of Castile.

Some wheat and flour are imported from France, Belgium, England, and the United States, but in very small quantities.

Exchange is usually effected through London.

Enough freight accommodation is offered by the Compañia Transatlantica from the United States; it is seldom accepted.

The obstacles in the way of the extension of trade in American flour in this district are the enormous number of mills for grinding wheat established here and their proximity to the producing centers of Spain.

FAUSTINO ADRIOZOLA,
Consular Agent.

SANTANDER, *February 2, 1894.*

SWEDEN AND NORWAY.

NORWAY.

STANDARD OF LIVING.

The bulk of the bread consumed in Norway is made of rye. The import of rye into this country amounted during the year 1892 to 252,945,000 pounds, and the receipts of rye flour were 47,025,000 pounds.

The general preference of the Norwegian people is for rye, instead of wheat, bread. Wheat is too costly for the general trade of the country, and its use is limited to a certain class of people, although the small difference in the price of rye and wheat during the last years has resulted in an increased demand for wheat. During the year 1890, when the harvest failed and Russia prohibited the export of rye, several shipments of American wheat flour were made to this country and profitably sold. Since then the import has constantly increased.

IMPORTS OF FLOUR AND WHEAT.

The reported imports of wheat flour into Norway during the calendar year 1892 were larger than in any previous year, amounting to 77,428,648 pounds, valued at $1,773,000, against 63,627,102 pounds, valued at $1,736,000, in 1891 and 48,138,826 pounds, valued at $1,150,000, in 1890. The statistics for the year 1893 have not yet been published.

According to the official Norwegian returns, the United States contributed to the extent of 10,835,528 pounds in 1892 and 7,221,148 pounds in 1891. These figures, however, do not give a correct estimate of the present flour trade between the two countries. It is impossible to give the exact import of wheat flour from the United States, because it is, as a rule, brought by steamers from the United States to Hamburg, and thence reshipped to this country. Consequently, the whole cargo is registered by the customs officers as German, although a large part of it may be American products. Very small quantities are carried by the two direct lines between New York and the southern part of Norway (the Scandia and the Thingvalla), as their freight charges are higher than shipments via Hamburg.

The import of wheat into this country in 1891 amounted to 26,786,474 pounds and in 1892 to 18,452,258 pounds, showing a diminution of 8,334,216 pounds. The direct import from the United States was 13,134,286 pounds in 1891 and 8,204,218 pounds in 1892.

DUTIES.

The import duty on wheat is 5.89 cents per 220 pounds and 34 cents per 220 pounds on wheat flour.

MONETARY EXCHANGE.

There are here large and solid bankers, who sell drafts on different commercial places in the United States and cash American drafts. American goods shipped to this country are, as a rule, paid by remitting money to London through bankers here.

OBSTACLES TO TRADE.

One of the principal disadvantages under which the American flour trade suffers is the long and irregular transport from the mills to the port of shipment in the United States. The flour shipped to this country from an inland town in the United States is always forwarded on a through bill of lading, acceptors of which are obliged to take all the risks. The railway companies are not bound by the bill of lading to send the flour by any particular train or vessel, and from two to three months often elapse before the Norwegian importers receive the flour, though their orders are always transmitted by cable to the mills.

When a buyer in Norway can not calculate within several months when he is likely to receive his flour, he often prefers to order German wheat, which reaches this country in about eight days.

GERH. GADE,
Consul.

CHRISTIANIA, *February 12, 1894.*

SWEDEN.

STANDARD OF LIVING.

Though the upper classes in this country have a high standard of living, the middle and lower classes are frugal and saving and pursue a plain and humble mode of living, their food consisting principally of bread, milk, and fish, with now and then a little meat. I can therefore safely say that bread constitutes the larger portion of the food used in Sweden.

In spite of the improvements made in farming here during late years, through importation of modern farm machinery and implements, the country can not produce wheat and rye enough to meet the home demand, and breadstuffs are very largely imported.

QUALITY OF FLOUR USED.

The flour mostly used here is rye flour, the majority of the people preferring rye bread. The bread supplied for the army, and, in a great measure, for the navy, is also made principally from rye flour. In 1891 the crops failed in Russia and the Russian Government prohibited the export of rye, and Sweden had to turn to other countries for its supply of breadstuffs. In consequence of this prohibition the price of rye had advanced so as to make wheat cheaper, and the use of wheat flour became more common, and, as a result, the import of wheat increased considerably. This seems to have changed, however, in 1893, so that the import of rye exceeded that of wheat.

Of wheat flour three qualities are sold here. The middle grade is used the most, the best quality in comparatively small quantities and chiefly in the cities.

IMPORTS OF GRAIN AND FLOUR.

The following tables will show the import of rye, wheat, and flour during three years, according to the last complete statistics available. These statistics, however, are not quite reliable as to imports from the United States, as American products have been imported chiefly through English and German agents, and the statistics give only the name of the country from which the products are last imported. The largest portion of the wheat and flour imported from England and Germany is therefore, in all probability, American. Even some of the wheat bought in Denmark is no doubt American, and the wheat flour bought from that country is generally manufactured in Denmark from American wheat.

Imports of grain and flour into Sweden.

Whence imported.	1890.	1891.	1892.
Wheat.			
Russia and Finland ....bushels...	548,753	489,385	409,539
Denmark ....do......	834,190	735,790	1,204,467
Germany ....do......	720,739	438,875	1,125,923
England ....do......	11,109	100,366	254,205
United States ....do......	....	332,911	790,008
Other countries ....do......	742	639,312	564,887
Total ....do......	2,115,533	2,736,639	4,349,029
Wheat flour.			
Russia and Finland ....pounds...	237,585	468,992	....
Denmark ....do......	23,609,989	18,861,142	20,394,271
Germany ....do......	9,865,588	13,851,559	19,530,289
England ....do......	193,202	739,068	....
United States ....do......	....	....	3,781
Other countries ....do......	272,218	444,606	8,181,494
Total ....do......	34,178,582	34,365,367	48,109,835
Rye.			
United States ....bushels...	....	22,726	224,375
Other countries ....do......	4,622,654	3,427,150	2,760,295
Total ....do......	4,622,654	3,449,876	2,984,670
Rye flour.			
United States ....pounds...	....	....	....
Other countries ....do......	28,544,572	22,393,921	25,898,646
Total ....do......	28,544,572	22,393,921	25,898,646

Total estimated imports into Sweden in 1893.

Wheat	bushels	4,399,573
Rye	do	3,184,584
Wheat flour	pounds	76,554,735
Rye flour	do	41,673,554

Imports into Gothenberg.

Description.		1891.	1892.	1893.
Wheat	bushels	305,621	403,290	473,275
Rye	do	394,183	96,310	72,171
Wheat flour	pounds	9,944,911	14,318,471	20,990,680
Rye flour	do	5,981,878	4,758,495	8,563,685

American wheat and flour are generally considered to be of good quality, and there is no objection to them except, perhaps, that they are too costly for the general trade of the country, where comparatively little white bread is used, as the consumption of this article is chiefly confined to the cities.

DUTIES.

The import duty on wheat, rye, and corn is 34½ cents, and on flour 67 cents, per 220 pounds. In 1888 the import duty on flour was raised to $1.15 per 220 pounds and on grain to 57½ cents per 120 pounds; but in 1892, when, owing to the short crops of 1891, Sweden was compelled to import more breadstuffs than usual, the duty was lowered to the present rates. In the Diet now assembled several voices have been heard advocating an increase in the import duty on breadstuffs to the rates of 1888, and it is hard to tell yet whether they will succeed or not, as the representatives from the cities form a solid party against such increase.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange is a subject on which volumes could be written. I understand that the credit system of this country is the main obstacle in the way of the extension of trade in American flour, as well as in all other articles. Merchants here are used to a longer and more extensive credit than is generally given by American traders. This custom of long credit is due to the low interest on money in Europe, and the constant refusal of American merchants to grant the time asked for by merchants here is no doubt due to the value of money in the United States. This, however, Swedish merchants are trying to remedy by opening bank credits in London or Hamburg, where interest is lower than in the United States. The American merchant under this new arrangement forwards to the London or Hamburg banker the evidences of the shipment of the goods, on receipt of which the draft is honored and charged to the Swedish purchaser, together with interest of 4 or 5 per cent for sixty or ninety days, as the case may be. American merchants, I am informed, have complained of the difficulty of obtaining information about the financial standing and responsibility of Swedish purchasers, and this has to a great extent been the reason why the former in many instances have been careful in engaging in direct communication with this country. This state of affairs, however, is rapidly changing, as mercantile agencies are being established in all the larger cities in Sweden, to which American merchants can apply for information concerning any business man in the country.

The facilities for the exchange of money in Sweden are, as far as I can find, on a par with any other European country. The mode of exchange, however, varies greatly and is generally governed according to contract made between seller and purchaser.

There were no facilities for direct shipment from the United States to Gothenberg except by sailing vessels, until 1893, when a direct line of steamers—the Scandia line—was established between Stettin and New York, the steamers calling here twice a month on their trips between said ports.

OBSTACLES TO TRADE.

The absence of direct and regular steamship communication between the United States and this port has, in my opinion, been one obstacle in the way of the extension of trade in American wheat and flour in Sweden, as the transshipment, agent's charges, etc., have a tendency to increase the price of the product. Another impediment is that the American exporters have no representation here. Reliable agents, provided with samples and authority to sell, could no doubt improve the business in American wheat and flour here. This would nevertheless depend on the crops in Russia, as abundant crops in that country, with consequent low prices, would materially increase the import of rye, which would have a tendency to decrease the demand for wheat and wheat flour.

OTTO H. BOYESEN,
Consul.

GOTHENBERG, *February 20, 1894.*

STOCKHOLM.

From the information gathered, my opinion is that, when American wheat flour can be delivered here at less cost, however slight, to the consumer than the same grades obtainable elsewhere, the prospects are that a much more extensive business can be done in American wheat flour in this country.

The official statistics do not show the actual quantity of American flour that finds its way into Sweden; probably four times as much as the official statistics show is imported from the United States indirectly via England, Germany, and Denmark. The explanation is that the Swedish statistics credit to each foreign country those goods, and only those goods, that are exported directly to that country.

One of our largest dealers in the raw cereal says:

> I have been watching the foreign flour trade, and, of course, could not help noticing the very considerable falling off in the imports as far as the United States are concerned. The imports of American flour were at first stimulated by the extra low quotations, lower than any miller in this country could have produced the flour for, and the trade gradually grew until last year there came, as it were, a collapse, the cause of which was the irregular deliveries, and the reason for these again was, in my opinion, that the trade had not been done direct with the millers, who would, of course, have kept up their standards, but through commission houses, who must have bought now of one, now of another miller, shipping everything under one common brand, quality well matched or not.

THOMAS B. O'NEIL,
Consul.

STOCKHOLM, *March 10, 1894.*

SWITZERLAND.

BASLE.

STANDARD OF LIVING.

The standard of living in this district is certainly as high as the average for Switzerland in general, since it embraces cities of considerable size and great wealth, like Basle and Neufchatel. The general standard for Switzerland, as determined by the consumption of wheat per head, is higher than that of any other European country except France. This is shown by the following table, published in the last report of the Swiss Society of Commerce and Industry. The quantity consumed annually by each inhabitant is:

Country.	Quantity.	Country.	Quantity.
	Pounds.		*Pounds.*
France	705	Turkey	247
Switzerland	418	Roumania	220
Spain	413	Austria	187
Belgium	378	Portugal	176
Hungary	361	Denmark	165
United States	357	Germany	143
England	352	Servia	120
Italy	310	Russia	99
Holland	283	Sweden and Norway	66

It must be said that for the present at least the people of this part of Switzerland are ready to eat American flour only in case of its being obtainable at prices considerably lower than are demanded for flour of European origin.

QUALITY OF FLOUR USED.

In all western Switzerland the people have the same decided preference for Russian wheat which their compatriots in the eastern part of the country show for Hungarian wheat. The flour consumed in this district is furnished by the local millers, who import Russian grain almost exclusively. It is imported from Odessa and other Black Sea ports by way of Antwerp or Holland, thence by the Rhine to Mannheim, and by rail to Basle.

The reason of the preference for Russian wheat flour is the prevalent belief that it is richer and contains a larger proportion of gluten than the American product. The people have formed a habit in this matter which the bakers feel obliged to respect. It is furthermore alleged that the lack of large storehouses prevents the bakers from introducing American flour for the purpose of mixing it with the product of the local mills, even when it can be imported at a very moderate price, and that repeated attempts of this kind in former years have resulted in failure. It is found more convenient for the bakers to supply their immediate wants by daily or weekly recourse to the local flour mills than to import carloads of flour, which are not easily handled, in consequence of lack of room in the railroad freight depots.

IMPORTS OF FLOUR AND WHEAT.

The consular district of Basle constitutes no definite geographical or administrative division of the country, and it is therefore impossible to determine even approximately the quantity of American wheat and flour imported here during a given year. In any event it must be very small. For each of the years 1890–'93, inclusive, the total importation of wheat into Switzerland was uniformly about 11,500,000 bushels, or almost exactly three-fourths of the whole quantity consumed. Of this quantity only 28,145 bushels in 1891, 1,500,000 bushels in 1892, and 1,000,000 bushels to September, 1893, are reported by the customs authorities as coming from the United States. I am informed by dealers, however, that considerably more of the wheat coming up the Rhine may be of American origin than is indicated by the official tables.

During the same years the United States furnished Switzerland with only 885 barrels of flour and meal of all kinds in 1890, with 6,104 barrels in 1891, and 734 barrels to September, 1893. The total annual importation of flour and meal from all countries does not differ materially from 260,000 barrels.

TRADE OUTLOOK.

The milling interest is one of the largest and strongest in Switzerland, and it is claimed that the mills are technically the best equipped in Europe, if not in the world. So long as economical and other reasons make it seem desirable to maintain this industry in its present or a higher stage of development, it will be extremely difficult to introduce American or other flour in large quantities. The above statistics show that the Swiss in general import at least ten times as much wheat as flour. The proportion of wheat is probably much greater, for the 260,000 barrels above given include all kinds of meal from cereals. Meantime American wheat can be introduced in much larger quantities by offering it at considerably lower prices than those paid for wheat of European growth or by demonstrating that the quality of the latter does not justify the preference which it enjoys.

GEORGE GIFFORD,
Consul.

BASLE, *March 7, 1894.*

ZURICH.

STANDARD OF LIVING.

The standard of living in Switzerland, and particularly in this consular district, is good. Bread made from wheat flour is one of the principal articles of food.

IMPORTS OF FLOUR AND WHEAT.

No statistics of the imports and consumption of American wheat flour are obtainable for this particular consular district. The federal custom-house gives the entire imports into Switzerland.

American wheat flour is not well known as such. There is no doubt, however, that it is being brought into this country quite extensively to be mixed with the home product for baking purposes, but it is sold as of European production. To check this practice American agencies should be established and the flour sold direct to bakers as American wheat flour. I am satisfied that after proper trials the sale of American wheat flour could thus be materially increased.

There is hardly any wheat raised in Switzerland. Most of that consumed is imported from other European countries and ground by the different local mills. Bakers in making bread use two qualities of flour, as shown by the samples I forward with this report to the Department.* These are known as No. 2 and No. 3 and are mixed for baking bread in the proportion of two-thirds of No. 2 and one-third of No. 3. A still higher grade of flour—No. 1—of the very best kind, is sold for family use and consumed in the preparation of articles of pastry, puddings, etc.

The following table will show the importation of flour from different countries (including the amount that the United States get real credit for) into Switzerland from the year 1855 to and including the year ending December 31, 1888:

Year.	Quantity.	Year.	Quantity.
	*Tons.**		*Tons.**
1855-'64 (average imports per annum)	15,687	1886	30,631
1865-'74 (average imports per annum)	16,252	1887	30,441
1875-'84 (average imports per annum)	25,849	1888	30,851
1885	30,239		

* 2,204.6 pounds.

This was at a cost of 32 to 56 francs per 100 kilograms.

The import into Switzerland of wheat flour from all sources, as per custom-house statistics, was as follows: In 1889, 22,805 tons; 1890, 21,023 tons;

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*Samples filed in the Department.

1891, 23,041 tons; 1892, 23,902 tons. From the United States it was: In 1889, none; 1890, 59 tons; 1891, 76 tons; 1892, 528 tons.

The population of Switzerland, as per latest census, is nearly 3,000,000.

As per Furrer's Volkswirthschaftliches Lexikon, there were in Switzerland in 1887 in full operation 2,400 commercial flouring mills and 800 peasant or custom mills. At the latter mills any farmer can take small quantities of wheat or other grain and get it ground. The amount invested in all of said mills represents a capital of 150,000,000 francs, or $50,000,000,[*] and a combined horse power of 25,000. They employ 8,000 people and 6,000 horses and grind up 4,500,000 metric quintals, or 450,000 tons (of 2,204.6 pounds avoirdupois each), of grain of all descriptions; but all this is not quite sufficient to cover the demand of the Swiss people.

The following table will show the importation into Switzerland of wheat from different sources for the calendar year 1892, later statistics being unobtainable (the report for 1893 importation will be ready in July next):

Countries.	Quantity.	Value.
	Tons.	*Francs.*
Russia	189,170	44,455,000
United States	42,556	10,001,000
Austria	40,242	9,457,000
Danube countries	30,068	7,066,000
Turkey	2,201	517,000
France	1,253	294,000
Other countries	2,554	600,000
Total	308,044	[*]72,390,000

[*] $13,971,270.

DUTIES.

The United States being one of the most-favored nations, the import duty on American wheat and flour is the same as that laid on similar importations from Germany, Austria, Italy, etc., viz: Flour of all kinds, 2 francs per 100 kilograms; wheat, 30 centimes per 100 kilograms, as against 2.50 francs per 100 kilograms for wheat imported from France, there being no treaty with that country.

EXCHANGE AND SHIPPING FACILITIES.

The banking facilities in Switzerland are excellent, large capital being invested in banking institutions. Money can be borrowed on approved securities or commercial paper at from 3 to 4 per cent per annum. The principal banking houses have direct correspondence with the United States, and American exchange is easy to negotiate advantageously.

Switzerland being an inland country, no direct communication exists between this country and the United States. Goods have to be shipped to Antwerp, Havre, Marseilles, Bremen, Hamburg, Rotterdam, or Genoa, and from any of these points forwarded by rail via Basle, Geneva, or the St. Gothard.

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[*] As given by the consul. If the reduction into dollars is correct, the amount in francs should have been 250,000,000 in round numbers.

As will be seen by the above, there is room for American wheat flour if our people will take the trouble to send energetic representatives to Switzerland to push it.

EUGENE GERMAIN,
Consul.

ZURICH, *March 5, 1894.*
No. 163——10.

TURKEY IN EUROPE.

DARDANELLES.

STANDARD OF LIVING.

The population of the province of Biga, of which Dardanelles is the chief town, is estimated at from 150,000 to 200,000 inhabitants. It is essentially agricultural, the peasantry growing their own bread crops of wheat, barley, rye, and corn. The grain is ground at the primitive water and wind mills, and bread is made of the cereals in varying proportions. It is the general custom for each household to make its own bread. Steam flour mills have been established in this town and in several of the larger villages where wheaten bread is used.

QUALITY OF FLOUR USED.

The varieties of hard wheat are milled, which, although not producing white bread, contain a large amount of semolina and are very nutritive.

IMPORTS OF FLOUR AND WHEAT.

On applying to the customs for statistics of imports of flour and wheat, I was informed they could not be furnished, as they did not make them for their own department. The merchants whom I next addressed gave the quantities of flour imported in the years 1891, 1892, and 1893 at about 10,000 sacks annually; the sack of 75 okes is equal to 201½ pounds, so the annual importation is about 2,000,000 pounds of soft wheat flour. The flour imported arrives almost exclusively from Roumania, and from Turkey, Russia, and France in small quantities. Roumania flour—Braila No. 3—is quoted to-day at $3.20 to $3.24 per sack of 201½ pounds and No. 4 at $3.02 to $3.05.

EXCHANGE AND SHIPPING FACILITIES.

Paper on most European countries can be negotiated, but with difficulty in the United States.

Conveyance of goods at through rates from the United States to the Dardanelles is made by the steamers of the French Messageries Maritimes, the Fraissinet, and the Italian Florio Rubattino companies.

TRADE OUTLOOK.

The question of the successful importation of American flour depends on price and quality. To test the question of its practicability it would have to be proven to the importer, but he would not take the initiative. Not a single barrel of American flour, so far as I can learn, has ever been imported here, and the imports of American grain are nearly nil.

FRANK CALVERT,
Consular Agent.

DARDANELLES, *February 13, 1894.*

UNITED KINGDOM.

BELFAST.

INTRODUCTION.

In order to get a report as complete as possible, I have had the consular agents at Londonderry, Lurgan, and Ballymena gather all the information practicable in their immediate territory. In the preparation of the report millers, wholesale and retail grocers, commission merchants, bakers, and consumers have been interrogated, their answers noted and sifted, and that which seemed of value to the American trade retained.

STANDARD OF LIVING.

Though the standard of living in this district is inferior to that of people in corresponding conditions in the United States, it is superior to that of any other port of Europe outside of Great Britain, and is even superior, in the matter of breadstuffs, to most sections of England and Scotland. This is particularly true of the working classes in the manufacturing cities of Belfast, Ballymena, Lurgan, Portadown, Newtownards, Coleraine, and Londonderry; while the farming classes are close followers. This consular district has within its confines many large and prosperous industries whose wage-earners receive better pay than elsewhere in Europe, Great Britain excepted. In the main the land is fertile and highly cultivated. The inhabitants are industrious and intelligent, having the best of highways, frequent railways, and coastwise facilities for intercommunication. The markets for the exchange of produce and merchandise are unexcelled. The inhabitants are now and have been for some years consuming American flour in large quantities. So extensive has its importation become that a large number of mills have been compelled to quit milling. According to the statement of one miller, the unoperated mills are 33 per cent of the whole number. The patent processes were introduced, but there was not sufficient demand for the offal; besides, flour in sacks from the United States could be imported cheaper than wheat. The mills now running are mostly on straight and low-grade flour. In short, American flour is the favorite, and more of it is used than all other flours combined.

QUALITY OF FLOUR USED.

There are three grades of flour coming into this district, viz, "patents," "straights," and "low grades," the last being used chiefly for feed. In the larger cities, where competition is keenest, the patents are in general use.

According to the statement of several bakers, the patents vary considerably in quality, and, as business success depends almost entirely on the quality of the bread, the most intelligent and careful discrimination is necessary in the selection of flour. They aim to get the best patents from both spring and winter wheat. It is difficult to sell any but the best grades of American flour in Belfast, which is a large distributing point as well as a large consumer. Its bakers and dealers have the reputation of being more exacting than those of any other section in the Kingdom. In the smaller towns and the country, where there is little or no competition and where home-made bread is more in use, the people are still satisfied in the main with the straight grades and are willing to subordinate whiteness and firmness to strength and economy. I may remark here that there is a growing impression that the American patents are not up to the standard of former years. Some of the bakers state that the quality is sacrificed to quantity, and, instead of 50 per cent of patent as formerly, there is now 60 to 70 per cent. Others attribute the alleged deterioration to loss of productive power in the soil. One baker said that he was mixing Hungarian flour with American in order to keep up the quality. If the American miller wants to retain this excellent market, he must guard against any falling off in quality, for there is no denying the fact that whenever the price and quality of flour in any other section of the world compare favorably with that of the United States there will be strong influences urged to change the base of supplies. British interests are constantly and indefatigably seeking markets for the vast output of their manufactured articles and the employment of their great merchant marine, and if they can discover a new market for an exchange of their manufactured goods for wheat and flour, they will avail themselves of it.

IMPORTS OF FLOUR AND WHEAT.

The imports of flour and wheat into Belfast and Londonderry during the years 1891–'93 were as follows:

Imports of flour into Belfast and Londonderry.

From—	1891.	1892.	1893.
Belfast.	*Tons.*	*Tons.*	*Tons.*
United States	24,806	34,975	48,662
Great Britain*	22,116	24,832	18,695
Germany	30	…………	10
Total	46,952	59,807	67,367
Londonderry.			
United States	3,554	3,398	5,619
Great Britain*	17,941	24,791	20,569
Total	21,495	28,189	26,188
Grand total	68,447	87,996	93,555

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*The imports from Great Britain have already been accounted for at the ports of original import (being foreign products) and are inserted in this table to show the imports at Belfast and Londonderry from all sources.

Imports of wheat into Belfast and Londonderry.

From—	1891.	1892.	1893.
Belfast.	*Tons.*	*Tons.*	*Tons.*
New Zealand	1,794		
India	26,044	12,810	16,104
Russia	3,946		1,052
Argentine Republic	371		6,345
Roumania	8,467	2,523	
Australia	2,310		2,433
United States	12,105	12,066	18,814
Great Britain*	20,310	22,718	17,491
France	50	355	422
Chile		9,683	3,144
Total	75,397	60,155	65,805
Londonderry.			
United States	1,747	5,308	2,876
Great Britain*	6,286	5,861	2,483
Total	8,033	11,169	5,359
Grand total	83,430	71,324	71,164

*The imports from Great Britain have already been accounted for at the ports of original import (being foreign products) and are inserted in this table to show the imports at Belfast and Londonderry from all sources.

Outside of American, Hungarian is the only other foreign flour imported into this consular district. The amount of Hungarian is estimated to be about one per cent of the total consumption. The reason assigned for the small quantity is the high price, the best grade commanding one-third to one-half of a cent more per pound than the best American patents.

EXCHANGE FACILITIES.

Exchange facilities are excellent. Banking institutions with large capital and low rates of interest are numerous and have their correspondents or agents in most of the larger cities of the United States. Mail conveniences are unexcelled, distance considered. Triweekly departures of the mails on the fastest ocean liners are the rule, while it often occurs that but twenty-four or thirty-six hours elapse between departures. Seven lines of cable, owned by five different companies, with moderate rates, cover emergency needs. The two peoples being of the same tongue, mistakes or misunderstandings are of rare occurrence, conditions which traders appreciate in their dealings with each other. If the decimal system were substituted for the pounds, shillings, and pence, the facilities for monetary exchange would be perfect.

SHIPPING FACILITIES.

Shipping facilities are very good and probably not excelled by any other port in the Kingdom, outside of Liverpool. There is at present one line of steamships (the Lord line) owned here which is devoted almost exclusively to the carrying of flour and provisions from the United States, while other lines owned here have occasional charters for some of their steamers for cargoes of flour. At Londonderry, from which point the northwest of Ireland as far as Sligo largely draws its supply, the shipping facilities are equally good, as Glasgow and Liverpool lines of steamships touch at Moville (some 16 miles from Londonderry) weekly or oftener, while ships laden with wheat and flour from the Pacific coast of the United States discharge their cargoes at the ample and convenient quays of that city.

OBSTACLES TO TRADE.

The information is somewhat conflicting, but in the main favorable to extension. For instance, Consular Agent Magahan, at Lurgan, reports:

> American flours are pushing the home-made flours out of use very fast, and local merchants, however unwilling, are compelled to use them. Home millers can not approach the finer grades of American flour; but in the lower grades they have the advantage, as American cheap flours are very poor. The consumption of American flour increases, and of home-made flour decreases, every year.

Consular Agent Rodgers, at Londonderry, draws different conclusions from the present conditions in his neighborhood, but I think they are only temporary. He reports:

> We have had some very heavy failures to record during the past three months, amounting, as nearly as I can ascertain, in the aggregate to $1,200,000. This has been brought about chiefly by overimporting on a continually falling market, entailing heavy losses on each cargo and being unable to dispose of what was brought in. It will be understood what position this port is in with regard to the flour trade when it is reported to me that there are upwards of 100,000 packages of flour warehoused here, most of which has been in store for nearly twelve months. I am therefore afraid that the prospects of extending the flour and wheat trade under the present depressed state of affairs is not of a promising nature, but we hope that when the spring opens trade will revive both in this country and in the United States.

In the city of Belfast and in the adjacent territory which it supplies the situation may be summed up thus: American flour is the favorite, and the demand is regularly increasing, as the tabulated statement plainly shows. The quantity imported in 1893 was double that imported in 1891. Some obstacles exist, one of the most important being the excellent quality of the wheat now coming from India. Although this arrives very dirty and has to be washed, it is very hard and dry. Even after washing (on an average one cwt. of dirt per ton has to be removed) it weighs out 21 cwts. per ton, on account of the moisture absorbed. The millers, importers, and commission agents also complain that the grading of American flour and wheat has gone down in the last few years. In this connection, it seems proper to note the complaints of consignees, in hopes that if possible they may be removed. One is, the damaged condition of the flour upon arrival, the bags not being strong enough to stand the wear and tear of handling nor tight enough to prevent the flour from being affected by the proximity *in transitu* of strong-smelling commodities.

Another complaint, which certainly deserves the careful consideration of all millers, consignors, and shippers, for considerable friction is consequent, is that there is lacking the necessary practical interest in the safe and prompt delivery of the merchandise to the ultimate carrier. At present, it is claimed, the shipper loses all interest in the goods as soon as he gets his bill of lading signed and his invoice discounted. If the merchandise be side tracked and delayed *in transitu*, or if there be a shortage or damage, all of which frequently occur, there appears to be no redress, notwithstanding constant and persistent efforts to that end. A Belfast commission firm informs me that they are compelled to keep a department devoted exclusively to the business of tracing the carrier who is responsible for shortage or damage, or both, but with indifferent success, because of the difficulty of fixing responsibility. The annoyance and discouragement arising from delays and losses, according to my informants, are such that if any other country could produce the same quality at corresponding prices the United States would be in imminent peril of losing their prestige in the flour trade.

A remedy is suggested in a federal statute, whereby the bill of lading can be so worded that the original carrier be held responsible for the safe and prompt delivery of the merchandise, under certain modifications, such as come under the head of unavoidables, etc., until in the possession of the final carrier. Each carrier would then insure himself against loss by seeing that the merchandise was received in good order. With such safeguards attending the transportation of merchandise, it is claimed that our foreign markets would increase and the demand for the American product become greatly enlarged.

TRADE OUTLOOK.

The prospects for doing a more extensive business in this consular district are conditional. The business already done is exceedingly large, being about 60 per cent of the whole. The trade is pushed with intelligence and vigor, and necessarily it will be harder work to capture any portion of the remaining 40 per cent of trade than it was to capture a large part of that now held. I believe, however, that if conditions remain favorable and the trade is pushed, a slice of it may be added to the already large bulk. The claim is being advanced in some quarters that the millers are so improving their mills by the introduction of new machinery that they can make almost, if not quite, as good flour as the best American brands, and that the Indian, Russian, and South American wheats, being cheaper and of equal quality, are coming more in demand. There are those who say that trade in both wheat and flour from the United States is more likely to decrease than increase, and that eventually nearly the whole supply will be obtained from other countries. I think I am safe in saying, however, that the higher grades of American flour "have the call." The preponderance of opinion is that, prices being equal, the American flour is the best, Hungarian excepted. More prosperous times in the United States will make the times more prosperous here. The wage-earner is the largest consumer of American flour, beef, pork, and produce, so that no work means no bread. Increase of population is slow, and no increase of trade need be expected from that cause. Great increase in the consumption of American flour need hardly be expected; but what is to the point, and which is of vital importance, is how to maintain and preserve the present very extensive trade against the constant, earnest, and united efforts of all other wheat-growing countries. These countries are abetted by the Irish millers and capitalists, whose energies and natural ambition are devoted to the restoration of this lucrative source of wealth and to supply work to many idle hands. American millers now have a firm grip on the trade. As experienced and astute men of business, they ought to study and provide the best means of holding and tightening their grip.

JAMES B. TANEY,
Consul.

BELFAST, *February 6, 1894.*

BRISTOL.

Of the total importation of breadstuffs into the United Kingdom during the harvest year ending July 31, 1893, 31 per cent (8,300,000 sacks of 280 pounds) was in the form of flour. The percentages of the harvest years 1891–'92, 1890–'91, 1889–'90, and 1888–'89 were 28, 25, 28, and 25, respectively. It will be apparent from these figures that there was a large increase in the import of flour last year—an increase the more remarkable as transportation rates were very low and there was consequently no special inducement to bring the flour and leave the bran behind. The increase has been entirely in the imports from the United States; and it is believed in the trade here that a considerable proportion has been sent forward with the certainty that the sale would not cover bare cost, freight, and charges. One explanation of shipments made under these circumstances is that it pays an American miller, whose output is in excess of local or domestic demands, better to ship his surplus abroad at a nominal loss than to reduce output.

During the last two years nearly 70 per cent of the breadstuffs imported into the United Kingdom came from the United States, while Russia, Roumania, and the Mediterranean may be credited with 10 per cent and India and the southern hemisphere with the remaining 20 per cent.

Seven-eighths of the flour imported into the United Kingdom during the harvest year 1892–'93 was supplied by the United States.

As will be seen by the tables following, kindly prepared at my request by Mr. Girdlestone, secretary and general manager of the Bristol docks, nearly 60,000 tons of flour were imported into Bristol from the United States during the year ending June 30, 1893. This vast quantity was all marketed in those contiguous districts for which Bristol is the distributing center, including the populous coal and iron districts of South Wales. In the south and west of England and in South Wales American flour has practically no competitor other than the product of the home millers. The import from Canada is inconsiderable, and only a nominal quantity of Hungarian flour comes into the district. To a certain extent, no doubt, the conditions of surplusage, freights, etc., operate with equal force upon wheat and flour. When there is a production largely in excess of domestic requirements, there is a large export of the two; but it is nevertheless true to a considerable extent that the shipment of flour means the opening up and maintaining a permanent market for a manufactured product—a product which will continue to be supplied, even after a diminished harvest shall have materially lessened the exports of wheat. The United States may be said, in the light of the statistics of the last few years, to have established a firm and lasting market for flour in the United Kingdom.

It should, however, be carefully noted by millers and shippers that a considerable change, during the past two years of low prices and oversupplies, has taken place in the taste of consumers. It has been the practice, until the last two years, for our millers to ship abroad their low-grade flours, such as "Spring Second Bakers" and "Winter Households," marketing their higher grades at home. Lately, however, they have been sending high-grade flours in such quantities as to weigh down the price to unprecedentedly low figures. The result is, so far as Bristol and the west of England are concerned, that the public taste has been educated up to a far higher grade of flour than it has been accustomed to in the past. The people generally have had little or no advantage in the price of the loaf (except in very poor districts). The quartern (4-pound) loaf sells to-day for 10 or 12 cents, just as it did five and ten years ago; but in quality it is quite a different thing. The dark, close, heavy, loggy loaf is a thing of the past. The loaf is now made for the average consumer from a straight or a low patent flour. Five years ago ordinary bakers' flour would have been used. Two years ago the price of this flour was $7.75 per sack of 280 pounds. Now, with the drop in the market and the different conditions in the public taste, it sells with difficulty at $4.12. If the conditions of production and distribution alter in the future, so that our millers have no longer such great surplusages of high-grade flours, they will no doubt recur to the original—I may almost say normal—practice of sending seconds to Bristol. They will find it unsalable at any price; the public will not have it.

It is the great exception for people here to bake at home. Even the villages and farmhouses depend upon the baker's cart. Ovens in houses are not adapted to baking, and the custom of a most conservative people is against it. The baker, having now supplied for some time a much more inviting loaf than was the practice in the past, is bound to maintain the quality. The American miller has long been familiar with the fact that the west of England would take a very low grade of flour, and I draw his special and particular attention to the changed conditions now obtaining.

The bulk of the flour imported comes in 140-pound sacks; a small quantity comes in 280-pound sacks. The barrel has gone quite out of favor.

At the present moment the advantage of price in favor of American flour over a similar grade of English is about 60 cents in 280 pounds. It will be wondered why, under these circumstances, English millers can market their output at all. The reason lies in the conditions under which the trade is carried on. The bakers throughout the west of England are, as a rule, small, with limited output and small capital, and they need credit and the cheap delivery of small quantities. They are not in a position, many of them, even to avail themselves of the reduced 2 and 4 ton railway rates; and they find it necessary to deal with local millers, who supply them in small quantities as desired, delivered free and on credit. Representatives of these mills call upon them regularly for orders and to collect accounts. Hence the necessity and convenience of continuing to deal with English millers. In the north, and particularly in Scotland and Glasgow, the bakers are more concentrated and have a large capital and a large output. They are therefore in a position to avail themselves of the cheapest market, and the result is apparent in an increased proportionate consumption of American flour.

No doubt throughout the whole country millers find it to their advantage to purchase American flour to mix with their own product, thus cheapening cost of production.

The old-time method of grading in this district was derived from the color of the string that tied the sack. "Plain-tie" still continues as a trade term, though such a grade would now as often be called "Country" or "Fine." "Blue-tie" and "Red-tie" are terms seldom met with, and "Patent" or "Superfine" have superseded them.

The import trade at Bristol and Gloucester is conducted through brokers and importers. The bulk of the flour comes C. I. F., and the broker sells to the importer and gets his commission. A certain percentage—perhaps 10 per cent—comes on consignment. I have not been able to find a single instance in which large consumers, such as public institutions, hotels, large millers, or large bakers, have established a direct and regular trade with the American exporter. I do not see any reason why large American millers properly represented in this country should not tender for consumers who buy by contract, and thus establish a regular trade directly with the consumer.

There are regular lines of steamers plying between New York and Bristol, and chartered steamers are constantly entering the port from Baltimore, Philadelphia, and other ports. The grain trade is a very important trade in Bristol, and every possible facility is freely accorded it by municipal and dock authorities.

Imports of flour into Bristol (years ending June 30).

From—	1891.	1892.	1893.
United States:	*Tons.*	*Tons.*	*Tons.*
New York	29,990	32,768	40,622
Baltimore	4,071	5,979	8,605
Portland	1,419	328	
Philadelphia		3,403	10,081
Tacoma		1,250	
Total	35,480	43,728	59,308
Canada (Montreal)	1,372	2,330	2,406
Grand total	36,852	46,158	61,714

Imports of wheat at Bristol (years ending June 30).

From—	1891.	1892.	1893.
	Cwts.	*Cwts.*	*Cwts.*
Russian and other European ports	1,481,463	609,718	614,448
United States:			
Astoria	48,790		48,422
Boston	28,498	74,430	51,426
Baltimore	21,424	129,021	275,533
New York	829,321	2,549,658	1,246,991
Philadelphia		47,101	544,410
Portland	192,948	316,380	186,360
San Francisco	40,164	71,808	
Seattle	44,520		
Tacoma	221,393	15,571	204,892
Total from United States	1,427,058	3,203,769	2,558,034
South America:			
Buenos Ayres		35,600	
La Plata			26,620
San Antonio			460
Talcahuano	40,714	286,422	118,524
Rosario	153,003	37,448	174,206
Total from South America	193,717	359,470	482,730
Canada (Montreal)	162,202	732,411	660,588
Australia and New Zealand	123,744		24,950
India		73,997	
Grand total	3,388,184	4,979,365	4,340,750

LORIN A. LATHROP,
Consul.

BRISTOL, *March 1, 1894.*

LEEDS.

STANDARD OF LIVING.

The standard of living is rather high, the laboring classes being composed very largely of miners and mechanics, who get good rates of wages; and, as flour is so cheap now, only the better qualities are used. American flour is not used here for domestic purposes. There is no objection, I think, to the use of American flour of the better grades; but, as stated below, none is brought here, the wholesale flour business being in the hands of millers, who naturally push the use of their own flour.

QUALITY OF FLOUR USED.

A high grade of flour is used, but only a low grade of American flour comes here. It is used for mixing food for cattle; it is not used in this district for domestic purposes at all.

IMPORTS OF FLOUR AND WHEAT.

Statistics regarding the import of American flour into this district are not available.

American wheat is very largely imported into the district, but no definite information can be obtained as to the amount. American spring wheat is largely used to mix with California and India wheat, to give the flour gluten or "rising" power.

The quantity of flour imported from other countries is almost nil. Some Hungarian is imported, but in a very small proportion.

Wheat comes from California, Australia, and India very largely. About three parts of foreign to one of English are used in this district.

TRADE OUTLOOK.

I do not think there is a very good prospect for the enlargement of the trade here in American flour. There are large mills owned by wealthy persons and companies who control the flour trade, supplying all the retail dealers and bakers. There are no wholesale flour dealers in Leeds.

NORFLEET HARRIS,
Consul.

LEEDS, *March 6, 1894.*

LIVERPOOL.

STANDARD OF LIVING.

The standard of living in the district of Liverpool is fully up to the average of the United Kingdom—about 5¾ bushels of wheat per head.

The better qualities of flour are most used.

IMPORTS OF WHEAT AND FLOUR.

The quantities of American wheat and wheat flour imported into this district during the years ending June 30, 1891, 1892, and 1893, were as follows, in cwts. of 112 pounds each:

From—	1891.	1892.	1893.
Wheat.	*Cwts.*	*Cwts.*	*Cwts.*
Atlantic ports	2,367,006	8,213,328	10,507,051
Pacific ports	3,399,325	1,362,332	2,242,754
Total	5,766,331	9,575,760	12,749,805
Wheat flour.			
Atlantic ports	2,190,394	3,114,978	3,309,155
Pacific ports	369,486	128,556	177,410
Total	2,559,880	3,243,534	3,486,565

Quantities of wheat flour imported from other countries.

Countries.	1891.	1892.	1893.
	Cwts.	*Cwts.*	*Cwts.*
Russia (southern)	124	....	....
Germany	24,709	12,600	5,991
Holland	....	....	180
Belgium	952	408	1,558
France	....	6	75
Spain	....	1,400	....
Gibraltar	....	2	1,165
Italy	395	6,010	1,940
Austrian territories	540,919	321,788	367,542
Turkey:			
European	....	250	....
Asiatic	....	....	2,476
Egypt	1,758	667	720
Bombay	3,800	40	3
Canada	217,950	190,396	402,911
Newfoundland	92	....	734
Chile	9,332	29,620	11,936
Brazil	26,376	....	....
Argentine Republic	7,308	2,737	5,609
Total from other countries	833,235	565,924	802,839
Total from the United States	2,559,880	3,243,534	3,486,565
Grand total	3,393,115	3,809,458	4,289,404

Quantities of wheat imported from other countries.

Countries.	1891.	1892.	1893.
	Cwts.	*Cwts.*	*Cwts.*
Russia (southern)	2,025,666	734,215	491,507
Germany	....	1,200	....
Belgium	400	....	....
France	2,379	20,938	9,953
Italy	....	....	1,000
Austrian territories	20	....	....
Malta	....	890	....
Roumania	967,022	....	....
Turkey:			
European	20,785	10,659	5,716
Asiatic	157,428	44,514	35,418
Cyprus	80	....	....
Egypt	422,261	563,884	1,000
Morocco	1,100	....	6,000
India:			
Bombay	4,307,914	5,606,005	2,532,223
Bengal	125,716	503,593	215,507
New Zealand	....	....	16,445
Canada	573,116	1,198,989	1,603,247
Mexico	....	6,051	....
Colombia	8,000	....	....
Chile	162,488	339,064	697,970
Brazil	....	580	....
Uruguay	6,000	....	....
Argentine Republic	1,775,857	817,868	1,391,468
Total from other countries	10,556,232	9,848,450	7,007,454
Total from the United States	5,766,331	9,575,760	12,749,805
Grand total	16,322,563	19,424,210	19,757,259

EXCHANGE AND SHIPPING FACILITIES.

With regard to the facilities for monetary exchange, the English banks send out representatives to the United States for the purpose of buying exchange, and some London provincial and Scotch banks have resident agents there for that purpose.

It is scarcely necessary to say anything about shipping between the United States and this port. In regard to through bills of lading, the trade says they should be signed jointly and severally by the carriers and not, as at present, jointly but not severally. The result when damage occurs under the present form of bill of lading is that the consignees can not, unless in exceptional cases, fix the liability on a particular carrier; but if the form of the bill of lading was altered as suggested, this evil would be remedied.

OBSTACLES TO TRADE.

Liverpool is considered an expensive port for cargo, the port and railway charges discriminating against it; for example, the railway freight on a ton of merchandise from here to Birmingham is $2.73, whereas from Bristol to Birmingham—about the same distance—it is only $2.06. This can only be righted by competition. Otherwise there are few obstacles to the extension of trade beyond the natural laws of competition with home-made flour. Distance, with consequent apparently insurmountable delays in transit, is a less serious hindrance than, as is claimed by English millers, the growing tendency of American millers to lengthen their patents, viz, extend the number of their processes under patent, and thereby increase their percentage, and consequently decrease the quality, and so degrade their whole output. English millers, on the other hand, claim to have steadily aimed at improvement in all grades, and they now assert their product to be as much superior as formerly it was inferior to that of their great rivals in the United States. It is said by the Miller's Association in Liverpool that local mills now command at least 80 per cent of the trade, against 25 per cent four years ago.* I have been unable to obtain any exact data to verify this, and give it herein as the opinion of local dealers. Excellence and regularity in quality are the indispensable adjuncts of a prosperous trade in any flour. In these respects the trade here claim that American flour has of late years deteriorated, and that the bakers' grades are quite too low for general consumption. I am not prepared to concede this, not being an expert in its manufacture; but American millers should know concerning the truth or falsity of this statement, and, should American flour have deteriorated in any way, the ingenuity and enterprise of the millers of the United States will soon bring it to a higher standard of excellence than it has ever had, I have no doubt. I submit herein the statements of the English dealers, given above, to stimulate our dealers to higher perfection in the manufacture of flour, without indorsing them as true myself.

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* The official figures of the imports of American flour into Liverpool, as given by our consul in the preceding part of this report is answer enough to this assertion. In 1891 the imports of American flour amounted to 2,559,880 cwts. and in 1893 to 3,486,565 cwts., an increase of over 36 per cent.

TRADE OUTLOOK.

With reference to the prospects for doing a more extensive business, that entirely depends on the crops in the United States and whether the millers can compete with their competitors in other countries. The system of consignments should be discouraged, and millers new at the business should be warned to hold their stocks until sales are effected, and not be led by unscrupulous travelers into consigning them in expectation of profitable sales. The system here is considered pernicious to the trade generally.

JAMES E. NEAL,
Consul.

LIVERPOOL, *February 12, 1894.*

MANCHESTER.

STANDARD OF LIVING.

The standard of living in the Manchester district is higher than that of most places in England. American flour, I am informed, is not generally liked, being considered too dry in the loaf. Bakers and their customers prefer local millers' flour mixed with Hungarian, the bread made from which will retain its moisture longer than that made from American flour.

QUALITY OF FLOUR USED.

About equal quantities of the local grades known as "Patent" and "XX" are used in this district to produce the two qualities of bread which are in request. The first-mentioned flour is usually about the same price in Manchester as American winter patents, and the "XX" $1.09 to $1.21 per 280 pounds lower.

EXCHANGE AND SHIPPING FACILITIES.

The facilities for monetary exchange at this port are equal to those of any provincial city in the Kingdom.

Since the 1st of January the Manchester Ship Canal has been open for traffic, in addition to the four principal railways centering at this port. The charge for tolls and wharfage on flour from Eastham (the mouth of the canal) to the Manchester docks is 73 cents per ton, to which must be added 2 cents per ton per mile for local delivery.

Prior to the opening of the Manchester Ship Canal all flour had to be transshipped at Liverpool and sent on to Manchester by rail or the Bridgewater Canal barges. There are thus far no direct steamers from the United States using the Manchester Ship Canal, with the exception of one or two with cotton (and a small quantity of grain) from Galveston and New Orleans, which, of course, are not available for the flour trade. One or two small shipments of American grain have been received here, but no flour as yet.

As Manchester was not created a port for customs purposes until January 1, 1894, there are no statistics available as to the importation of American flour and wheat into this district during the years 1891, 1892, and 1893.

OBSTACLES TO TRADE.

The chief obstacle in the way of the extension of trade in American flour here is, I am told, the unsuitable character of the article itself. Kansas flours have been somewhat better taken, as they possess good flavor and the bread from them retains its moisture, but of late the quality has been irregular and the price too high.

TRADE OUTLOOK.

Mr. J. Bolton, of the firm of Johnson & Bolton, the principal flour merchants in this city doing a direct business with the United States, to whom I am indebted for the greater part of the information contained in this report, says:

> If millers will make an article possessing a good flavor, and the bread from which will retain its moisture, taking especial care to keep the quality regular, and if along with this there can be arranged a quick transit service by direct steamers via canal, there is every probability of an increased sale of American flour. It would be necessary to guard against such delays as are common at present in the shipments to Liverpool, so that buyers might depend upon receiving their goods within a reasonable time after shipment from the mill.

To this I would add that Manchester is the center of the largest and most populous industrial area in Europe, numbering upwards of 7,000,000 people. This great working community includes one hundred and fifty-one towns, each of which is engaged in skilled labor. Eleven of these towns have each a population exceeding 100,000, and one hundred of them have each more than 10,000 inhabitants.

WILLIAM F. GRINNELL,
Consul.

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